FirstClass Version 8 Client

This version of the help applies to FirstClass Version 8.0.

This PDF is a creation of Stewart Lynch with the permission of the FirstClass Division of Open Text Corporation. Any comments/questions regarding the PDF should be addressed to Stewart Lynch (slynch@CreaTECHSol.com)

Bookmarks, links and page numbers on pages 3-9 added by Fred Sheffler. 8/26/2004

Introduction

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Viewing

- summary bar shows how much of your allotted disk space you have left
- clicking icons on the summary bar opens a list of the users who have the container open, which you can work with like the Directory list
- the names of users who are currently logged in are in bold
- limit the users who can see whether you are online
- temporarily list only a selected type of mail, such as unread mail
- toolbar customization is saved on the server, so that you see the same toolbars from any computer
- Index Card view
- in List view, select the columns you want displayed
- update information directly without opening objects
- place an object in the pane you want or hide it
- reset the toolbar to the default
- add customized resources, such as pictures, to containers

Calendars

- Today view includes a mini month pane for easy navigation
- can view multiple weeks in week view
- create untimed events, which show at the top in day view
- multiday events span days, when multiple days are displayed
- import and export calendar items in vCalendar format
- export calendar items for use with BlackBerry
- specify default reminder timing for events and tasks that you create
- set a "snooze" time for reminders, to make them reappear
- change the category and color of received events, and change their reminder specifications
- accept invitations on a tentative basis
- invitations from users without permission to add events to your calendar are sent to your Mailbox
- participants are automatically asked to respond

Contact management

- address books have been renamed Contacts folders
- create contact databases that you can share with other users
- contact databases include Rolodex-style buttons for jumping directly to entries
- import and export personal addresses in vCard format
- export personal addresses for use with Outlook, BlackBerry, or another FirstClass system
- import vCard or Excel files that are attached to messages
- specify the personal address form to use for a contact database

Instant messaging

- chats are now called instant messages, and public chats are called chat rooms
- format text and embed pictures and recordings in instant message transcripts
- can moderate instant messages
- attach files to instant messages

- save instant message transcripts
- control what users who enter instant message sessions in progress see in the transcript
- let others in the instant message session know you are temporarily unavailable
- create chat rooms

Editing content

- tables
- photographs copied to the clipboard are pasted as .jpg files
- Paste Special options include .jpg instead of .bmp and .jpg quality, and allow you to paste tab- or comma-delimited files as tables
- embed recordings in content
- provide comments (that show as tooltips using the client) for embedded images
- Control-click (Windows) or Option-click (Mac OS, Mac OS X) embedded links in editable content to use them

Messages

- forwarded messages include header information from the originals
- replies with quotes include the time the original message was sent
- send secure S/MIME messages

FirstClass Personal

- the Personal post office is now called the personal store
- the Windows folder that contains the personal store has been renamed from PPO to FCPS (there is no Mac OS FirstClass Personal)

Other

- additional print layout options for personal contacts information
- downloaded FirstClass objects are converted to .rft format, with header information included
- export memos for use with BlackBerry
- use a secure connection to log in
- Connections List indicates whether a connection is secure
- use only the FirstClass server to authenticate logins
- Home Page Folder renamed to My Web Site (intended for viewing shared objects using web browsers)
- My Shared Documents folder (intended for viewing shared objects using the FirstClass client)
- My Documents folder (intended for storing private objects)
- all clients except Mac OS support multiuser environments
- FirstClass Plugin for Microsoft Explorer provides a client-like interface on Internet Explorer in Windows
- specify the FirstClass look and feature set that you will see when you connect using a web browser

[Introducing FirstClass]
[About the FirstClass system]
[FirstClass objects]
[Files and folders installed with FirstClass]

Introducing FirstClass

FirstClass is an easy-to-use, advanced communications and information system. Here are some of the things you can do with FirstClass:

- send and receive electronic mail (email), phone messages (voice mail), and faxes
- transfer files so that other users can access them
- browse through and send messages to common areas that other users can also use
- maintain online calendars, through which you can set up meetings with other users
- maintain contact databases, where you can store information about your personal contacts
- engage in instant messaging sessions with other users who are online
- organize items for easy access
- publish information on the World Wide Web (web).

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About the FirstClass system

The FirstClass system consists of two parts: a server and a client that connects to it.

Servers

A server stores all your messages and documents, and the Mailbox, conference, and folder structure that contains these items. It also contains information about all the users known to the server.

Your organization may have multiple servers, and you may be able to connect to some of these servers as well. On each server, you will see the objects that the administrator for that server has given you permission to see. The server to which you normally connect is considered your home server.

Clients

Client software runs on your computer. It connects to a server, and provides the interface (such as menu commands) that lets you work with FirstClass objects.

You can use one of the following clients to connect to a server:

- a standalone client that comes with FirstClass and runs on Windows, Mac OS, or UNIX, and which you install on your computer (this is what this help assumes you are using)
- a web browser
- a client-like plugin for Internet Explorer
- a phone
- a handheld device.

Note
This help is located on your server, and therefore describes the client version that shipped with the server. If it does not seem to describe the client that you are running, contact your administrator to check which client version you should be using.

FirstClass objects

These are the basic objects that you'll work with when you use FirstClass.

Messages

Messages are pieces of email that are sent through FirstClass. Messages may be sent:

- locally on the same FirstClass server
- through a gateway that connects another FirstClass server or another messaging system
- through the Internet to anyone who can receive email.

Documents

You can create documents in FirstClass much as you do messages. These are the differences between a message and a document.

A message:

- is intended for mailing to someone electronically, and therefore includes space in the header for address information
- cannot normally be edited after being sent (although FirstClass does let you unsend a message)
- expires after a certain period by default (FirstClass automatically deletes expired objects)
- is automatically named with the name of the sender (for mail received) or recipient (for mail sent).

A document:

- is intended for posting directly to an area where others can see it, and therefore can't be mailed
- can be edited after it has been posted
- never expires by default
- must be named explicitly.

Uploaded files

You can upload files such as word processing and graphics files so that they are available to other users. These files can be attached to messages or placed directly in containers.

Folders

FirstClass folders work just like other folders you are used to on your operating system. You can create and name folders, then put messages and documents in them to organize your work area for easy access.

The folder My Documents is a place to put private documents, files, and so on. My Shared Documents is a place to put objects that you want to share with other users.

In addition, your administrator may create external folders.

Conferences

At first glance, FirstClass conferences look like folders. A conference serves the same purpose of putting items with a common topic into one place, but there are some important differences.

A folder:

- is intended mainly as an organizational aid
- doesn't have directly controlled access; the folder's container determines its access

- can only hold messages that have been moved there
- doesn't indicate that it contains unread mail when it's closed.

A conference:

- is intended mainly as an online forum for the exchange of information
- has controlled access; you need to be given certain permissions to be able to see and work with it
- can be the recipient of messages
- is flagged when it contains unread mail.

Calendars

FirstClass includes online calendars that record time commitments, such as meetings, and tasks that you need to complete. In addition to your own personal calendar, you may have access to public calendars that let you schedule meetings at mutually convenient times.

Contact databases

You can store personal addresses and mail lists in contact databases, to simplify addressing messages. You have a personal contact database, called your Contacts folder. In addition, you can create public contact databases for sharing personal addresses and mail lists.

Instant messages

Instant messages are real-time, online discussions with other users who are currently connected to your server.

Your Desktop

Once you are connected to a FirstClass server, your Desktop opens. It contains your Mailbox, plus any containers that you or your administrator have placed on your Desktop.

Your Mailbox

Your FirstClass Mailbox contains:

- messages that have been sent to you
- all messages that you have sent
- messages that you have created but not yet sent.

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Files and folders installed with FirstClass

The Windows, Mac OS X, and Linux versions of FirstClass support multiple users on one machine. To do this, they make use of your operating system's shared applications area. This area stores the supporting files and folders that ship with applications.

If you update one of the FirstClass files in the shared area when you aren't logged into your computer as administrator (and therefore don't have write access to the shared area), the updated file is placed in your personal user space, in the appropriate folder (the original is left untouched in the shared area, for other users). From then on FirstClass will use the file that is in your user space. If you add a file (even if you are the computer administrator), it is added to your user space, in the appropriate folder.

Windows locations

Application file: Program Files\FirstClass

Shared files and folders: FirstClass, in your operating system's shared space (for example, Documents and Settings\All Users\Application Data\FirstClass)

Your user space: FirstClass, in your operating system's user space (for example, \My Documents\FirstClass)

Mac OS X locations

Application file: /Applications

Shared files and folders: /Library/FirstClass

Your user space: /Users/*your user space*/Library/FirstClass

Linux locations

Application file: /opt/firstclass

Shared files and folders: /opt/firstclass

Your user space: ~/firstclass

Mac OS locations

The Mac OS client doesn't support multiple users. When you install FirstClass, a folder is placed on your hard disk. This folder contains the FirstClass application file and other FirstClass files and folders.

Make sure that the FirstClass application file remains in the same folder as the FirstClass folders, or FirstClass won't run properly.

FirstClass folders

Download

This is the default folder for files that you download from the server.

Fcctemp

This folder contains temporarily downloaded files that need to be viewed with external applications. The location of this folder depends on your operating system.

FCP

This folder contains connection files (.fcp files) that are used to connect to servers. The file names indicate the connection types.

Images

This folder contains graphics files that you can choose when assigning background pictures to FirstClass windows and objects. Adding files to this folder is one way to expand the basic set of pictures that come with FirstClass.

Modems
Not applicable to Linux or Mac OS X

This folder contains command files (.mdm files) for modems. The file names indicate the modems. When you choose a modem as part of your configuration, the contents of this folder are reflected in the list of available modem choices.

Plugins

This folder contains a viewer that enables FirstClass to display QuickTime files. If your administrator provided special viewers or other files that extend FirstClass' capabilities, they also belong in this folder.

Scripts

Not applicable to Linux or Mac OS X

This folder is the place to store any modem connection script files (.fcl files) that you need to connect to a server.

Settings

This folder contains any settings files (.fc files in Windows) supplied with FirstClass, plus any additional files that you create.

Tools

This folder contains the dictionaries supplied with FirstClass. These dictionaries are used when FirstClass spell checks text.

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Configuring Connections

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Types of connections
Where information is saved
Connections supported by default
If you want different behaviors for the same protocol

Note
We assume that your connection is already set up and working properly. We only discuss how to tell FirstClass about your connection. If you don't know what connection type to use after reading this help, contact your administrator.

Types of connections

These are the ways you can connect to a FirstClass server:

- local network

  Your computer is plugged into a high-performance local area network (LAN) that allows you to communicate with any other computer within the network. This is the most common method for people connecting from medium- to large-sized businesses. You may also hear the term TCP/IP applied to this type of connection.
- Internet

  Your computer connects to the server through the Internet. There are several levels of Internet connections:
  - high-speed Internet

    An Internet connection that is fast and causes few problems. It may use a cable or DSL modem.
  - Internet

    A basic Internet connection that is not always reliable (you get errors and disconnects).
  - dialup Internet.

    A connection that dials up to connect to the Internet.
- modem

  Your computer connects directly to the server through a modem. The modem used by your computer uses a telephone line to communicate with a modem at the server site. There are several types of modem connections, including ISDN and Comm Toolbox. You may also hear the term TAPI for your type of connection. Modem connections are not applicable to Mac OS X or Linux.
- AppleTalk

  This is a form of LAN used in the Mac OS and Mac OS X environments.
- IPX.

  This is a form of LAN used in the Windows environment only.

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Where information is saved

Depending on your connection type, when you configure a connection, you supply information on one or two forms: the Service Setup form and the Configure Connection form.

The Service Setup form contains information such as the server address. This information is stored in your settings file.

The Configure Connection form contains information about your connection protocol (how your computer connects to the server). This information is stored in the appropriate .fcp file. There is one .fcp file for each connection protocol. Normally, all settings files that use the same connection protocol obtain their connection information from the same .fcp file. The .fcp files are located in the FirstClass FCP folder.

About settings files

FirstClass stores the information needed to connect to a server in a settings file. Settings files can also store resources used by FirstClass, such as forms, pictures, and sounds. In Windows, settings files always end in .fc.

FirstClass includes a home.fc settings file. If you downloaded FirstClass from your server and followed the instructions there, this settings file already knows your server's name.

Note
If you just use home.fc to connect to your server, and this connection works well the first time you click Login, you will not need to configure your connection. You only need to read the information about configuring if you must change connection information for home.fc or you want to configure a connection to another server.

Your administrator may have provided you with a settings file that contains the necessary information for logging into your server. If this is the case, put this file in the FirstClass Settings folder.

Providing a shared home.fc settings file for multiuser computers

Not applicable to Mac OS

By default, all settings files created by a user are placed in the FirstClass Settings folder that is located in that user's personal user space. This includes the home.fc settings file that is automatically created when the user first runs the client.

If FirstClass is running on a computer with multiple users, the computer administrator (the person who logs into the computer as Administrator, not your FirstClass administrator) can create a home.fc settings file for use by all users of that computer.

To do this, the computer administrator must be the first to run the FirstClass client. This will place home.fc in the administrator's personal user space. The administrator saves connection information, but not a user ID or password. After home.fc has been created, the administrator can drag it into the FirstClass Settings folder that is located in the shared applications area.

If a user updates home.fc, FirstClass places a copy of the updated settings file in that user's personal user area. The shared settings file isn't changed.

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Connections supported by default

By default, only local network and Internet connections are supported by the FirstClass client. If you want to use AppleTalk, IPX, or a modem connection, you must install files that support your protocol. These files are available for download from the Conferences/Software Libraries section of FirstClass Online or the Downloads section of our web site.

Download the appropriate .fcp file to the FirstClass FCP folder.

If you are going to use a modem, you must also download the appropriate modem file (.mdm) to the FirstClass Modems folder.

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If you want different behaviors for the same protocol

When you configure a connection, you are updating the .fcp file that is used for all connections using this protocol (for example, all modem connections).

If you want to make a change that only applies to one settings file, and not to others that use the same .fcp file, you can create a new .fcp file. To do this, create a duplicate of the applicable .fcp file in the FirstClass FCP folder, then name the duplicate, using the extension .fcp.

Example

You have a modem connection for which you want the speaker on for some systems, but off for others. You copy MODEM.FCP and rename the duplicate QUIET.FCP to accommodate turning the speaker off. Then you can create a new settings file that uses QUIET.FCP, or just change the selection as necessary when you log in.

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Information on specific connections

Local network connections
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Protocol used by local network connections

Local network connections use the [TCP/IP](#) protocol.

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Information you must supply

To configure a local network connection, you need the following information:

- whether you are connecting directly to the server or through a proxy server (your company may use a proxy server if your internal network is protected by a firewall)
- the server's IP address or domain name
- the port number of the server
- the proxy server's IP address and port number (if you are connecting through a proxy server).

If you do not have all of this information, contact your administrator.

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To configure your connection

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address". If you are using Windows or Linux, make sure the name ends with .fc.

3 Click Setup.

4 Update the [Service Setup form](#).

5 Click Configure.

6 Update the Settings tab of the [Configure Connection form](#).

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Protocol used by high-speed Internet connections
Information you must supply
To configure your connection

Protocol used by high-speed Internet connections

High-speed Internet connections use the TCP/IP protocol.

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Information you must supply

To configure a high-speed Internet connection, you need the following information:

- whether you are connecting directly to the server or through a proxy server (your company may use a proxy server if your internal network is protected by a firewall)
- the server's IP address or domain name
- the port number of the server
- the proxy server's IP address and port number (if you are connecting through a proxy server).

If you do not have all of this information, contact your administrator.

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To configure your connection

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address". If you are using Windows or Linux, make sure the name ends with .fc.

3 Click Setup.

4 Update the Service Setup form.

5 Click Configure.

6 Update the Settings tab of the Configure Connection form.

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Protocol used by basic Internet connections
Information you must supply
To configure your connection

Protocol used by basic Internet connections

Basic Internet connections use the UDP/IP protocol.

Top

Information you must supply

To configure a basic Internet connection, you need the following information:

- whether you are connecting directly to the server or through a proxy server (your company may use a proxy server if your internal network is protected by a firewall)
- the server's IP address or domain name
- the port number of the server
- the proxy server's IP address and port number (if you are connecting through a proxy server).

If you do not have all of this information, contact your administrator.

Top

To configure your connection

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address". If you are using Windows or Linux, make sure the name ends with .fc.

3 Click Setup.

4 Update the Service Setup form.

5 Click Configure.

6 Update the Settings tab of the Configure Connection form.

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Protocol used by dialup Internet connections
Information you must supply
To configure your connection

Protocol used by dialup Internet connections

Dialup Internet connections use a UDP/IP protocol that has been tuned for slower throughput (smaller packet and sliding window sizes) than the standard UDP/IP protocol. This results in faster message delivery than would be the case with regular UDP/IP on a dialup connection.

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Information you must supply

To configure a dialup Internet connection, you need the following information:

- whether you are connecting directly to the server or through a proxy server (your company may use a proxy server if your internal network is protected by a firewall)
- the server's IP address or domain name
- the port number of the server
- the proxy server's IP address and port number (if you are connecting through a proxy server).

If you do not have all of this information, contact your administrator.

Top

To configure your connection

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address". If you are using Windows or Linux, make sure the name ends with .fc.

3 Click Setup.

4 Update the Service Setup form.

5 Click Configure.

6 Update the Settings tab of the Configure Connection form.

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About TCP/IP
About UDP/IP

About TCP/IP

TCP/IP is a "guaranteed-delivery" protocol that maintains and manages its own connections.

TCP/IP is best for connections that are relatively error free, and where there is high throughput on the connections (so that the TCP/IP buffer is flushed quickly).

Top

About UDP/IP

We use the FCP delivery protocol to deliver reliable connections over UDP/IP. This lets FCP control when to disconnect in the event of an error.

FCP can deal better with errors that would cause TCP/IP to immediately disconnect you, because it has been adjusted to better cope with an unreliable environment. These adjustments involve such things as timeouts waiting for packets before attempting retries, and packet and sliding window sizes.

UDP/IP is best for error-prone or slower connections (where it may take some time to flush the large buffers that are often found in TCP/IP connections). It is optimized to provide faster interactive response to your requests in this environment.

Because the total data size is less than the TCP/IP buffers, you should notice quicker response times for an activity such as opening the first item in a filling container (over a fast, reliable connection, TCP/IP still outperforms UDP/IP in this regard).

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[Information you must supply](#)
[To configure Comm Toolbox connections](#)
[To configure all other modem connections](#)

Protocols used by modem connections

Because there are different types of modem connections, there are different protocols that support these connections:

- Windows modem (TAPI) (Windows)

  Windows NT 4.0, Windows 95, or later, include TAPI, a technology that lets you configure modem connections using system information already known to Windows.

- FirstClass modem (Windows)

  Use this protocol if you want to use FirstClass' own Windows modem handling. You will have to supply more information than you would for a Windows modem connection.

  This protocol is available for compatibility with older Windows systems and connection configurations. If you have a newer Windows system, we recommend that you use the Windows modem protocol.

- serial modem (Mac OS)
- Comm Toolbox (Mac OS)

  This protocol is used for both Comm Toolbox and Mac OS ISDN* connections.

- Comm Toolbox Serial (Mac OS)

  Use this protocol if your Comm Toolbox cannot directly access the serial card in your computer.

- ISDN* (CAPI) Adapter (Windows).

* ISDN is a digital telephone line that provides greater speed than a regular telephone line.

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Information you must supply

To configure your particular modem protocol, you need the information listed below. If you do not have all of this information, contact your administrator.

Windows modem (TAPI) information

- the server's phone number
- the modem you want to use for this connection (if you have multiple modems configured on your computer)
- the name of your connection script file (if you require a special connection script)
- the line number you want to use for this connection (if your modem supports multiple lines)

FirstClass modem information

- the server's phone number
- your modem type
- the port to which your modem is connected
- your phone type (dial or touch tone)

- the name of your connection script (if you require a special connection script)

Serial modem information

- the server's phone number
- your modem type
- the port to which your modem is connected
- your phone type (dial or touch tone)
- the name of your connection script (if you require a special connection script)

Comm Toolbox information

- the server's phone number

For other information you need, see your Comm Toolbox documentation.

Comm Toolbox Serial information

- the server's phone number
- your modem type
- your phone type (dial or touch tone)
- the name of your connection script (if you require a special connection script)

For other information you need, see your Comm Toolbox documentation.

ISDN (CAPI) Adapter information

- the server's phone number
- the ISDN protocols that are appropriate for your ISDN adapter and the server to which you are connecting

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To configure Comm Toolbox/Comm Toolbox Serial connections

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address".

3 Click Setup.

4 Update the Service Setup form.

5 Click Configure.

6 Choose Comm Toolbox or Comm Toolbox Serial at "Protocol" on the Configure Connection form.

7 Click Comm Toolbox Setup and configure the settings as instructed by your Comm Toolbox documentation.

If you are using Comm Toolbox Serial, you also need to update the fields on the Settings tab.

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To configure all other modem connections

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address". If you are using Windows, make sure the name ends with .fc.

3 Click Setup.

4 Update the Service Setup form.

5 Click Configure.

6 Update the Settings tab of the Configure Connection form.

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Further information on modems
Modem concepts and standards
Modem connection scripts

[Flow control and handshaking]
[Baud rate]
[Fall back]
[Hardware carrier detection]
[DTR hangup]
[Modem standards]
[How FirstClass works with your modem]

Flow control and handshaking

Most high speed modems can still connect to older, lower speed modems. When they do, they receive information from the compute at high speed, and send the data out at a lower speed. Therefore, they may have to instruct the computer to slow down periodically.

Flow control is the method a modem uses to control the quantity of data the computer sends to the modem. It ensures that data is not lost if it is sent to the modem faster than the modem can accept it.

There are two widely recognized standard methods for flow control: software handshaking (using XON/XOFF) and hardware handshaking (using RTS/CTS).

Software handshaking (XON/XOFF)

You cannot use software handshaking with FirstClass. However, most high speed modems default to RTS/CTS handshaking, as do many other programs. Therefore, you must ensure that any modem setup strings you create do not turn on XON/XOFF handshaking.

Hardware handshaking (RTS/CTS)

If you use a high-speed modem or a modem with error correction or data compression, you must enable hardware handshaking. Hardware handshaking uses the Clear to Send (CTS) and Request to Send (RTS) pins on the modem cable to control data flow.

To use hardware handshaking, you must have a hardware handshaking cable (that is, a cable with the RTS and CTS lines enabled at both ends).

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Baud rate

The measure of how fast a modem transfers data. The faster the baud rate, the faster the data transfer. If you divide the baud rate by 10, you get a rough estimate of the number of bytes (or characters) transferred per second, and this provides an idea of how long a file transfer will take.

For example, a 2400 bps modem can transfer about 240 bytes per second (that is, about 1Kb every four seconds). Therefore, a 25Kb file would take about 100 (25x4) seconds to transfer.

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Fall back

When two modems first connect, they negotiate to find the best communication speed they can both use for the connection. Often this speed is less than the maximum speed supported by one of the modems. In this case, the faster modem "falls back" to the lower rate.

For example, if modems with speeds of 9600 bps and 14400 bps try to connect, they would negotiate a connection at the speed of 9600 bps. The modem whose speed is 14400 bps would then fall back to 9600 bps.

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Hardware carrier detection

FirstClass detects that the connection to a server has been dropped using one of the following methods:

- it monitors the length of time before it receives a response from the server
- it monitors the state of the Carrier Detect pin on the modem cable.

The second method identifies a dropped connection most accurately. To use this method, you must enable hardware carrier detection when you configure your modem connection. The modem turns this pin on when it receives a special tone, called the carrier, from the remote modem. When the modem stops receiving this tone, it turns this pin off, and FirstClass reports that the connection has been dropped.

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DTR hangup

A computer can tell a modem to hang up a call in the following ways:

- send the Attention string followed by the Hangup string
- configure the modem to monitor the Data Terminal Ready (DTR) pin, then turn off the DTR pin.

We recommend that you do not use the Attention string method. If the modem speed does not match the computer speed, the Attention string will not be received correctly, and the modem might not hang up. Since speeds can easily get out of sync during some negotiations, the DTR line is more reliable.

If you select the DTR pin method, FirstClass tries to hang up the modem by turning off the DTR line, waiting for an OK, then sending the Hangup command.

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Modem standards

The standards described here fall into three categories:

- modulation (speed)
- error correction
- data compression.

Most modem standards are referred to by a code assigned by the Consultive Committee for International Telephony and Telegraphy (CCITT).

Note
Take care when choosing modems with proprietary standards for high-speed communication, error correction, or data compression. These features only work when the modems at both ends of the connection support the same standards.

Modulation (speed) standards

Modulation (or speed) standards involve the rates and ways modems communicate with each other, and how they negotiate the best communication speed they can both use for the connection. These are common modulation standards:

- V.22

  The CCITT standard for data transmission at speeds up to 2400 bps.

- HST

  The USR proprietary standard for data transmission at speeds from 9600 to 16800 bps, depending on the model.

  The reverse channel is much slower. If you are connecting to another type of modem, the best speed you can expect is 2400 bps.
- Hayes V-series

  The Hayes proprietary standard for data transmission at speeds up to 9600 bps.

  The reverse channel is much slower. If you are connecting to another type of modem, the best speed you can expect is 2400 bps.
- V.32

  The CCITT standard for data transmission at speeds up to 9600 bps.
- V.32bis

  The CCITT standard for data transmission at speeds up to 14400 bps.
- V.32terbo

  The AT&T proprietary standard for data transmission at speeds up to 19200 bps.
- V.fc

  The Rockwell chip set proprietary standard for data transmission at speeds up to 28800 bps.
- V.34

  The CCITT standard for data transmission at speeds up to 28800 bps.
- K56flex

  The Lucent and Rockwell proprietary standard for 56K modems.
- x.2

  The US Robotics proprietary standard for 56K modems.
- V.90

  The CCITT standard for 56K modems.

Error correction standards

Error correction standards provide a way of correcting errors that result from outside interference, such as noise on the phone line. Error correction ensures that data coming out of the receiving modem is exactly the same as data going into the sending modem.

Error correction standards correct only those errors occurring between the two modems. They cannot correct errors occurring between the modem and the computer (a connection which is considerably more reliable when proper cables are used and connections secured).

These are common error correction standards:

- V.42

  The CCITT error correction standard.
- MNP Error Control

  The Microcom Networking Protocol (an early error correction standard).

The V.42 standard is partly based on MNP.

Data compression standards

Data compression standards provide a way of compressing data at the sending modem, transmitting it across the modem link in compressed form, and then expanding it at the receiving modem.

If the data can be compressed, data compression increases the effective throughput. If the data cannot be compressed (for example, if it has already been compressed with a utility such as Stuffit or PKZip), then modems with data compression give little benefit.

These are common data compression standards:

- V.42 bis

  The CCITT data compression standard.

  This standard has a theoretical maximum compression ratio of four to one.

- MNP Level 5 Compression

  The Microcom data compression standard.

  This standard, part of the V.42bis standard, has a lower maximum compression ratio (two to one). MNP 5 actually slows down the transfer of already compressed files.

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How FirstClass works with your modem

The interaction of FirstClass with your modem begins when you connect to a server. FirstClass automates the stages of the login process, using the connection configuration stored in the connection file.

At each stage of the process, two status lines appear on the FirstClass Login form. The first line shows the action in progress. The second line shows the commands sent to the modem and the responses from the modem.

The following stages occur during login:

- Stage 1

  FirstClass sends the Reset string to the modem on the serial port (Mac OS) or the COM port (Windows) specified in the connection file and waits for the modem to return an OK response. The status line displays "Resetting modem" followed by the Reset string sent to the modem.

- Stage 2

  When the server receives the OK response, it sends the Setup string and waits for an OK. The status line displays "Setting up modem" followed by the Setup string sent to the modem.

  Note
  Because each modem requires a different Setup string, you must select the correct modem type on the Connection form.

- Stage 3

  If any optional settings (such as Speaker, H/W Handshake, DTR Hangup, or Carrier Detect) are set in the MODEM.FCP file, FirstClass sends the Option string to the modem. The status line displays "Sending modem options" followed by any optional commands sent to the modem.

- Stage 4

  FirstClass sends the Dial String to the modem and waits for a CONNECT response from the modem. The Dial string contains the phone number defined in the settings file. The status line displays "Dialing the number" followed by the Dial string sent to the modem. After the Dial string has been sent, the first status line displays "Waiting for connection".

  Make sure the phone number on the status line is correct, including any prefixes (such as 9 or 1) and area codes.

- Stage 5

  If the modem is able to negotiate a connection, the status line displays the messages "Negotiating connection" and "Connected". When the connection is established, your user ID and password are sent to the server. If they are correct, your FirstClass Desktop opens.

  If all server modems are busy, your modem returns a BUSY response and the login fails. If your modem is unable to connect, it returns a NO CARRIER response and the login fails.

If any stage in the login process fails, the login stops.

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[About modem connection scripts]
[Connection script commands]

About modem connection scripts

If you use a modem and require a special connection script to connect to a server, you can create a connection script file, then choose this file at "Script" when you configure connection information.

A connection script executes automatically when a modem initiates or answers a call. You may need such a script, for example, if you are connecting through an X.25 network.

To create a connection script file:

1. Use a text editor to type the appropriate connection script commands.
2. Save the script as a plain text file with an extension of .fcl.
3. Move the file into FirstClass' Scripts folder.

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Connection script commands

Use the following commands as required to build your connection script.

DELAY

Syntax

`DELAY` *`time`*

Description

DELAY tells the server to wait for a specified time. The value time is the time you want the server to wait, in 60ths of a second.

Example

`DELAY 600`
tells the server to wait 10 seconds

DISPLAY

Syntax

`DISPLAY` *`text`* `-D`
or
`DISPLAY "`*`text string`*`" -D`

Description

DISPLAY sends text to the modem for display purposes only. The value text is the text you want to send to the modem. If this text contains spaces, enclose the whole text string in single or double quotation marks.

Example

`DISPLAY "X.25 login sequence starting" -D`
displays this:
X.25 login sequence starting

SEND

Syntax

`SEND` *`text`*
or
`SEND "`*`text string`*`"`

Escape sequences

You can add the following escape sequences to this command:

- \r - adds a carriage return after the text
- \n - starts the text on a new line.

Description

SEND sends text to the modem. The value text is the text you want to send to the modem. If this text contains spaces, enclose the whole text string in single or double quotation marks.

Example

`SEND an63z\r`
sends the password an63z, followed by a carriage return, to the modem

WAITFOR

Syntax

`WAITFOR` *`string1 string2`* `...` *`stringn`* `-T` *`timeout`*
or
`WAITFOR "`*`string1`*`" "`*`string2`*`" ... "`*`stringn`*`" -T` *`timeout`*

Description

WAITFOR tells the server to wait a specified time for any of the strings included in this command to be returned from the remote modem. If none of these strings are received during this time, the server terminates the connection attempt and reports a 1083 error (timeout in script).

The string values are the strings you want the server to wait for. If a string contains spaces, enclose it in single or double quotation marks. You can list as many strings as you want.

The timeout value is the time you want the server to wait, in 60ths of a second.

Example

`WAITFOR service disconnect "no carrier" -T1200`
tells the server to wait 20 seconds for any of these strings: service, disconnect, or no carrier

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Information you must supply
To configure your connection

Information you must supply

To configure an AppleTalk connection, you need the following information:

- the server's network name
- the name of the AppleTalk zone in which the server is located, if it is different from your computer's zone.

If you do not have all of this information, contact your administrator.

Top

To configure your connection

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address".

3 Click Setup.

4 Update the Service Setup form.

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Information you must supply
To configure your connection

Information you must supply

To configure an IPX connection, you need the server's network name.

If you do not have this information, contact your administrator.

Top

To configure your connection

1 Open the FirstClass FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at "Address". Make sure the name ends with .fc.

3 Click Setup.

4 Update the Service Setup form.

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Very rarely, you may need to configure things such as window and packet size, or turn on tracing. In normal circumstances, you never need to do this.

To configure advanced connection information:

1 Open the FirstClass Login form.

If FirstClass is already running, choose Collaborate > Connect.

2 Make sure the settings file you want to configure is selected at "Address".

If the settings file is not listed, click Browse to search for it.

3 Click Setup.

4 Click Configure on the Service Setup form.

5 Update the Advanced tab of the Configure Connection form.

[Changing the encryption level](#)
[Changing the authentication method](#)

When you connect to your FirstClass server, your connection's security is affected by:

- the level of encryption used on all data that is exchanged between your client (the commands you give FirstClass) and the server (FirstClass' responses to your commands)
- the method used to authenticate you (check that you are a valid user) when you log in.

Changing the encryption level

To change the default level of data encryption for all of your connections that use the same connection protocol:

1. Open the Configure Connection form.
2. Choose the security level you want at "Encrypt" on the Advanced tab.

You can override this default for a particular connection by updating "Encryption" on the Service Setup form.

Note
Some servers will automatically make your connection secure, no matter what level you chose.

If your connection is secure

If you log into a server using a secure connection:

- you may see a message about a public key the first time you connect to that server

  This is part of the security mechanism. It identifies the server to your client. If you know what the public key should be, check that the displayed key is correct. If you don't know what the public key should be, just accept the value you see.
- you'll see a lock icon in the status bar after you connect.

Note
If FirstClass notifies you that the server can't support secure connections, change your security level to Fast.

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Changing the authentication method

Your administrator decides how logins will be authenticated. They may be authenticated only by the FirstClass server (called FirstClass secure authentication), by a remote server, or by a combination of the two.

If you never want your logins for a particular connection authenticated by a remote server, select "FirstClass secure authentication only" on the Service Setup form.

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Changing your password
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Logging In

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About logging in

Depending on how your administrator set up the server and your user account, you may be able to connect (log in) to a server as:

- a registered user

  Your administrator provided you with a personal user ID and password.

- a user who can autoregister

  Your administrator set up the server to allow autoregistration. When you autoregister, you supply the user ID and password that you want to use for future connections. The next time you log in, you do so as a registered user.

- a guest user.

  You do not require a user ID or password. Guests are generally more limited in what they can do than registered users.

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Logging in as a registered user

To log in as a registered user:

1 Double-click the FirstClass icon.

Linux
Choose FirstClass > FirstClass Client from the "start" menu.

2 Update the FirstClass Login form.

3 Click Login to open your FirstClass Desktop.

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Autoregistering

To autoregister:

1 Double-click the FirstClass icon.

Linux
Choose FirstClass > FirstClass Client from the "start" menu.

2 Update the FirstClass Login form.

For "User ID" and "Password", use the values that you want to use to connect to this server in the future.

3 Click Login.

4 Update the Autoregistration form.

5 Click Register.

6 Record your user ID and password from the confirmation form for future use.

7 Click one of the following:

- OK - opens your FirstClass Desktop
- Save - opens your FirstClass Desktop and saves your user ID and password in the settings file.

If you click Save, your user ID and password will be displayed on the FirstClass Login form the next time you choose this server. If you don't want this information displayed automatically for security reasons, click OK instead.

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Logging in as a guest user

To log in as a guest user:

1 Double-click the FirstClass icon.

Linux
Choose FirstClass > FirstClass Client from the "start" menu.

2 Update the FirstClass Login form.

3 Click Login to open the guest account's FirstClass Desktop.

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Logging in using an IMAP client

If you have a client that supports the IMAP4rev1 standard (Netscape IMAP client, or a Microsoft IMAP client such as Outlook Express), you can use this client to connect to a FirstClass server.

For instructions, see your client documentation.

Top

Updating settings files

You may need to change connection information for an existing settings file, or incorporate changes from another settings file (such as one supplied by your administrator) into your own settings file.

To change connection information

1 Click Setup on the FirstClass Login form.

2 Update the Service Setup form.

To incorporate changes from another settings file

1 Log into FirstClass using the settings file that you want to update.

2 Double-click the settings file that contains the updates.

If this settings file is attached to a message, you can double-click it directly from the message.

3 Click Update at the Resource Updater form.

Note
If the settings file is large or you are on a slow connection, you may have to wait for this form to open.

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Clearing resources from settings files

FirstClass can import a picture or form resource from your server as you need it; however, it will only do so if you do not already have a copy of the resource in your settings file.

If you know that there are updated resources on the server, and you want to import them, you must clear your old resources from your settings file. Clearing resources does not affect the connection information that is stored in your settings file.

To clear resources from your settings file:

1 Open the FirstClass Login form.

Note
Don't log in. You can't clear resources from your settings file while you are connected to the server.

2 Make sure the settings file you want to clear is displayed at "Address".

3 Click Setup.

4 Click Flush Cache.

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Clearing settings files from the FirstClass Login form

As you select and create various settings files, the list of files grows at "Address" on the FirstClass Login form. If this list becomes unwieldy, you can clear files from it. Cleared settings files remain in FirstClass' Settings folder, so you can still browse to select them.

To clear the settings file displayed at "Address", open the shortcut menu from it, then choose Clear.

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Connecting to multiple servers

If you have access to multiple servers, you can connect to more than one at the same time. You will see a Desktop for each server to which you are connected.

To connect to multiple servers:

1 Log in as you normally do, choosing the settings file for the first server at "Address" on the FirstClass Login form.

2 Choose Collaborate > Connect to reopen the FirstClass Login form.

3 Log in as you normally do, choosing the settings file for the second server at "Address".

4 Repeat as many times as required.

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Logging in with multiple user IDs

If you have multiple user IDs, or can autoregister, you can open multiple connections to the same server with different user IDs. You will see a Desktop for each user ID.

To log in with multiple user IDs:

1 Log into the server as you normally do, using the first user ID and password with which you want to connect.

2 Choose Collaborate > Connect to reopen the FirstClass Login form.

3 Log in using the second user ID and password with which you want to connect.

4 Repeat as many times as required.

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Logging in from multiple computers

Your administrator may allow you to log into the same server using the same user ID and password from multiple computers.

If you are connected multiple times using the same user ID, and your administrator has limited the length of time you can connect per day, be aware that the time spent by all connections is added together and counted against your daily time allotment.

Example
If your first connection has been active for 30 minutes, and your second connection has been active for 15 minutes, you are considered to have used up 45 minutes of your daily time allotment.

To log in from multiple computers, simply log in as you normally do from each one.

Top

Checking your connections

To see a list of all servers to which your computer is connected, and all user IDs used for these connections, choose Collaborate > List Connections.

The Connections List shows this information:

- whether the connection issecure

  If the connection is secure, you will see a lock icon like the one below; otherwise, this column is blank:

  

- Site Name - the server to which you are connected
- User ID - the user ID with which you are connected to this server
- Connect Time - the length of time you have been connected, in hh:mm:ss format
- Time Left - the length of time you have left before you will be automatically logged off.

  Your administrator may have defined a maximum time that you can be connected per day. If no time shows here, you do not have a daily connection time limit for this server and user ID.

- Items - the number of objects open for this connection.

To bring all windows for a particular connection to the foreground, in the order they were opened, double-click the connection in the list.

To end a connection, select it, then click Disconnect Selected.

To end all connections, click Disconnect All. This does not quit the FirstClass client. It is still active on your computer.

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Disconnecting from a server

You can disconnect from a server in the following ways:

- to end your current connection, choose Collaborate > Disconnect, or close all open windows for this connection
- to end all connections and quit the FirstClass client, choose File > Exit (Windows), File > Quit (Mac OS, Linux), or FirstClass > Quit FirstClass (Mac OS X).

In addition, you can use the Connections List to disconnect from servers as well as check your connections.

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Connecting automatically

You can connect to a server as soon as you start FirstClass, without having to update the FirstClass Login form. To do this, you must use a settings file configured for automatic login to start FirstClass.

Note
For security reasons, we recommend that you do this only in an environment where other users can't access your computer.

To configure the settings file:

1 Start FirstClass.

2 Choose the settings file at "Address" on the FirstClass Login form, or type the name for a new settings file.

3 Click Setup.

4 Update the "User ID" and "Password" fields on the Service Setup form, if these are blank.

If this is a new settings file, also update the fields required for your connection.

5 Select "Log in automatically".

To use this settings file to connect automatically, double-click it or drag it over your FirstClass application.

You can disable automatic connection by pressing Control (Windows, Linux) or Option (Mac OS, Mac OS X) while you open the settings file.

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If your administrator gave you a user ID and password, we recommend that you change the password to something only you know, for security reasons.

Make your password difficult to guess. Consider mixing numbers and letters. Don't use your own name or user ID, or any other easily guessed value, such as your birth date or the name of a family member or pet.

To change your password:

1. Log into the server for which you want to change your password.
2. Choose Collaborate > Change Password.
3. Update the Change Password form.

Problems with network connections
Problems with modem connections
Recording connection information

Problems with network connections

If you cannot connect to a server over a network, check whether:

- your settings file is incorrectly configured

  For example, the server domain name is wrong.
- the appropriate .fcp file is missing from FirstClass's FCP folder
- the server is not running
- all sessions on the server are in use

  The server is set up to handle a limited number of simultaneous connections. Try again later.
- your network interface card (NIC) is configured incorrectly, or it or the cable is defective.

  For information on configuring your NIC, see the documentation provided with it.

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Problems with modem connections

To test your modem configuration, connect to another modem using a terminal emulation package (for example, Windows Terminal for Windows systems). For more information, see your modem documentation.

Certain problems are reported by FirstClass. In this case, they have a FirstClass error number. Make of note of this number in case you need to contact your administrator.

No response from the server's modem

You may get this error because:

- the modem at the other end is not connected to a FirstClass system

  Make sure you are specifying the correct modem phone number, with any necessary dialing prefixes, in your service setup information.
- your modem is incompatible with the server's modem

  This is especially common for modems that offer high speeds or advanced protocols. Try lowering the baud rate in your connection information.
- a poor phone connection is causing line noise

  This is common for long distance calls. Try the call again.
- you specified the wrong modem type for your modem when you configured connection information
- the value of the connect timeout register (S7) is too short.

  Use a text editor to open the modem (.mdm) file you are using and change the MLTO value. This value is in 60ths of a second. Try 90 seconds (MLTO=5400). Your value here will map to the S7 register. For more information on the S7 register, see your modem documentation.

Host does not appear to be a FirstClass server

You may get this error because:

- the two modems negotiated, but the system at the other end did not respond to the FirstClass login request

Make sure you are specifying the correct modem phone number, with any necessary dialing prefixes, in your server setup information.

- there are hardware handshaking problems (Mac OS only)

  Make sure you have a cable that supports hardware handshaking.

Communication failed while connected

When a modem connection fails while a call is in progress, the cause can be difficult to identify. Possible reasons are:

- a poor phone connection is causing line noise

  This is common for long distance calls. Try the call again.

- another application, such as a screen saver, graphics application, or file compression utility, running on your computer is using up available system resources

  Quit other applications and try again.

- the network packets may be interfering with the serial port, if you have a high-speed modem and are also connected to a network

  Disable the network connection and try again.

- the baud rate that was specified when you configured connection information is too high.

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Recording connection information

You can log trace information that tells you how the connection between your FirstClass client and a server is operating. You can use this information to help you solve your problem on your own, or with the help of your administrator. Trace information can be logged for various connection events. This information is added to the standard logging information in the FirstClass client log file.

To specify the trace information to log

1 Open the FirstClass Login form.

2 Make sure a settings file is selected at "Address" that uses the type of connection (for example, LOCAL NETWORK) for which you want to log trace information.

Note
Trace information will be logged for every settings file that uses this type of connection.

3 Click Setup to open the Service Setup form.

You can verify that you are configuring the correct connection type by looking at the value in "Connect via". For example, to log trace information for a modem connection, this field should say MODEM.FCP.

4 Click Configure.

5 Click the Advanced tab on the configuration form.

6 Select the events for which you want trace information at "Trace options".

To generate the log

Windows

To generate the log file, add the following line in the [FCSetup] section of the FCIC.ini file in your Windows folder:

```
debug=1
```

The log file is called FCIC.log, and is located in the FirstClass application folder. The file is saved with an extension of .old the next time you start FirstClass (if `debug=1` is still set). If you need to save several log files, rename each one with a unique name before you next start FirstClass.

Mac OS, Mac OS X

To generate the log file, press Command Option as you start FirstClass. You will see a console window, which is an online version of the log that is being generated.

The log file is called FirstClass.log, and is located in the FirstClass application folder (Mac OS) or ~/Library/FirstClass (Mac OS X). The file is overwritten each time you start the client using Command Option. To save log information permanently, rename the log file before you next start FirstClass.

Linux

To generate the log file, start the FirstClass client from a terminal window, and redirect logging information to the file name and location of your choice. The following example starts FirstClass and redirects logging information to a file called fcc.log in the ~/firstclass directory:

```
/opt/firstclass/fcc >~/firstclass/fcc.log &
```

The log file is overwritten each time you start the client using this command. To save log information permanently, you can:

- rename the log file before you next start FirstClass
- append new logging information to the existing file by using >> instead of > in your redirect command.

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Basic Concepts

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Ways to perform commands

There are often several ways you can perform the same task with FirstClass. For example, you can delete selected text in a message you are composing by:

- choosing Edit > Clear from the menu
- pressing Delete on the keyboard
- choosing Clear from the shortcut menu.

To open a FirstClass object, you can:

- double-click it
- select it, then choose File > Open > Open Selected.

To open a container, and move an object into it, you can:

- open the target container, then drag the object to the target
- drag the object and hover over the target until it opens.

In some cases, you can also click a toolbar button or a button on a form, or use a keyboard shortcut.

Tip
When choosing a menu item from a dropdown field, you can type a letter to move to the first item starting with that letter. For example, if you are choosing a font from a "Font" field, and you want Verdana, you can type v to move to the first font that starts with v.

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Keyboard shortcuts

About this Window
Windows: F1

Approve
Windows/Linux: Ctrl `
Mac OS/Mac OS X: Cmd `

Attach
Windows/Linux: Ctrl T
Mac OS/Mac OS X: Cmd T

Black
Mac OS/Mac OS X: Option Cmd K

Blue
Mac OS/Mac OS X: Option Cmd B

Bold
Windows/Linux: Ctrl Shift B
Mac OS/Mac OS X: Shift Cmd B

Brown
Mac OS/Mac OS X: Option Cmd W

Check Spelling
Windows/Linux: Ctrl Shift L
Mac OS/Mac OS X: Shift Cmd L

Close
Windows/Linux: Ctrl W
Mac OS/Mac OS X: Cmd W

Connect
Windows/Linux: Ctrl K
Mac OS/Mac OS X: Cmd K

Copy
Windows/Linux: Ctrl C
Mac OS/Mac OS X: Cmd C

Cut
Windows/Linux: Ctrl X
Mac OS/Mac OS X: Cmd X

Delete
Windows/Linux: Ctrl D
Mac OS/Mac OS X: Cmd D

Delete the next word
Windows/Linux: Ctrl Delete
Mac OS/Mac OS X: Option Forward Del

Delete the previous word
Windows/Linux: Ctrl Backspace
Mac OS/Mac OS X: Option Delete

Directory
Windows/Linux: Ctrl L
Mac OS/Mac OS X: Cmd L

Disconnect
Windows/Linux: Ctrl K
Mac OS/Mac OS X: Cmd K

Exit
Windows: Alt Shift F4

Find
Windows/Linux: Ctrl F
Mac OS/Mac OS X: Cmd F

Find Next
Windows: F3 or Ctrl G
Linux: Ctrl G
Mac OS/Mac OS X: Cmd G

Find Previous
Windows: Shift F3
Mac OS/Mac OS X: Shift Cmd G

Format Paragraphs
Windows/Linux: Ctrl Shift M
Mac OS/Mac OS X: Shift Cmd M

Format *selection*
Windows/Linux: Ctrl M
Mac OS/Mac OS X: Cmd M

Forward
Windows/Linux: Ctrl Shift =
Mac OS/Mac OS X: Shift Cmd =

Get Info
Mac OS/Mac OS X: Cmd I

Gray
Mac OS/Mac OS X: Option Cmd E

Green
Mac OS/Mac OS X: Option Cmd G

Help Contents
Windows: Shift F1

Hide Bcc
Windows/Linux: Ctrl B
Mac OS/Mac OS X: Cmd B

History
Windows/Linux: Ctrl H
Mac OS/Mac OS X: Cmd H

Insert File
Windows/Linux: Ctrl Shift T
Mac OS/Mac OS X: Shift Cmd T

Insert Horizontal Line
Windows/Linux: Ctrl Shift H
Mac OS/Mac OS X: Shift Cmd H

Insert Page Break
Windows/Linux: Shift Enter
Mac OS/Mac OS X: Shift Return

Insert Signature
Windows/Linux: Ctrl Shift S
Mac OS/Mac OS X: Shift Cmd S

Italic
Windows/Linux: Ctrl Shift I
Mac OS/Mac OS X: Shift Cmd I

Larger
Windows/Linux: Ctrl]
Mac OS/Mac OS X: Cmd]

Magenta
Mac OS/Mac OS X: Option Cmd M

Mark as Read/Unread
Windows/Linux: Ctrl -
Mac OS/Mac OS X: Cmd -

Move between panes
Windows/Linux: Ctrl up or down arrow
Mac OS/Mac OS X: Cmd up or down arrow

New Message
Windows/Linux: Ctrl N
Mac OS/Mac OS X: Cmd N

Next in Thread
Windows: F2
Linux: Ctrl /
Mac OS/Mac OS X: Cmd /

Next pane (Explore view)
Windows: F6 or Ctrl Tab
Mac OS/Mac OS X: Cmd up or down arrow

Next Unread
Windows/Linux: Ctrl U

Mac OS/Mac OS X: Cmd U

Open Bookmarks
Windows/Linux: Ctrl 3
Mac OS/Mac OS X: Cmd 3

Open Calendar
Windows/Linux: Ctrl 6
Mac OS/Mac OS X: Cmd 6

Open Contacts Folder
Windows/Linux: Ctrl 2
Mac OS/Mac OS X: Cmd 2

Open Desktop
Windows/Linux: Ctrl 0
Mac OS/Mac OS X: Cmd 0

Open Home Page
Windows/Linux: Ctrl 4
Mac OS/Mac OS X: Cmd 4

Open Mailbox
Windows/Linux: Ctrl 1
Mac OS/Mac OS X: Cmd 1

Open Memos
Windows/Linux: Ctrl 8
Mac OS/Mac OS X: Cmd 8

Open My Shared Documents
Windows/Linux: Ctrl 9
Mac OS/Mac OS X: Cmd 9

Open Résumé
Windows/Linux: Ctrl 5
Mac OS/Mac OS X: Cmd 5

Open Selected
Windows/Linux: Ctrl O
Mac OS/Mac OS X: Cmd O

Open Voice Greetings
Windows/Linux: Ctrl 7
Mac OS/Mac OS X: Cmd 7

Orange
Mac OS/Mac OS X: Option Cmd O

Paste
Windows/Linux: Ctrl V
Mac OS/Mac OS X: Cmd V

Paste Special
Windows/Linux: Ctrl Shift V
Mac OS/Mac OS X: Option Cmd V

Permissions
Windows/Linux: Ctrl ;
Mac OS/Mac OS X: Cmd ;

Plain
Windows/Linux: Ctrl Shift P
Mac OS/Mac OS X: Shift Cmd P

Previous in Thread
Windows: Shift F2
Linux: Ctrl Alt /

Mac OS/Mac OS X: Option Cmd /

Print
Windows/Linux: Ctrl P
Mac OS/Mac OS X: Cmd P

Properties
Windows/Linux: Alt Enter

Quit
Linux: Ctrl Q
Mac OS/Mac OS X: Cmd Q

Quoted
Windows/Linux: Ctrl Shift '
Mac OS/Mac OS X: Shift Cmd '

Red
Mac OS/Mac OS X: Option Cmd R

Redo
Windows/Linux: Ctrl Y
Mac OS/Mac OS X: Cmd Y

Replace
Windows/Linux: Ctrl Shift F
Mac OS/Mac OS X: Shift Cmd F

Reply
Windows/Linux: Ctrl R
Mac OS/Mac OS X: Cmd R

Reply with Quote
Windows/Linux: Ctrl '
Mac OS/Mac OS X: Cmd '

Save As
Windows/Linux: Ctrl S
Mac OS/Mac OS X: Cmd S

Scroll one screen at a time (one page at a time in presentation view)
Page Up/Page Down

Select All
Windows/Linux: Ctrl A
Mac OS/Mac OS X: Cmd A

Select all items with a common value
Windows/Linux: Ctrl Shift-click
Mac OS/Mac OS X: Shift Cmd-click

Send
Windows/Linux: Ctrl E
Mac OS/Mac OS X: Cmd E

Send and Close
Windows/Linux: Ctrl Shift E
Mac OS/Mac OS X: Shift Cmd E

Show Bcc
Windows/Linux: Ctrl B
Mac OS/Mac OS X: Cmd B

Show Presentation
Windows: F5
Linux: Ctrl Alt P
Mac OS/Mac OS X: Option Cmd P

Smaller
Windows/Linux: Ctrl [
Mac OS/Mac OS X: Cmd [

Smart Zoom
Windows: Ctrl =

Stop activities
Windows/Linux: Ctrl Break
Mac OS/Mac OS X: Cmd .

Underline
Windows/Linux: Ctrl Shift U
Mac OS/Mac OS X: Shift Cmd U

Undo
Windows/Linux: Ctrl Z
Mac OS/Mac OS X: Cmd Z

Upload
Windows/Linux: Ctrl T
Mac OS/Mac OS X: Cmd T

Yellow
Mac OS/Mac OS X: Option Cmd Y

Zoom In (viewer window)
Shift up arrow

Zoom Out (viewer window)
Shift down arrow

Zoom Window
Mac OS/Mac OS X: Cmd =

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Window appearance
Changing window appearance
Moving split bars
Hiding the status bar
Resizing windows
Switching between 3D and non-3D
Changing window backgrounds
Going to specific windows

Window appearance

A FirstClass window showing the contents of a container normally consists of:

- a menu bar
- a toolbar
- a summary bar
- one or two panes
- a status bar.

The summary bar shows:

- the container name
- a summary of container contents

  If items are indicated as Hidden, this means that your viewing preferences are set to hide items that you have read.
- the server and your user name
- the percentage you have left of your allotted disk space on the server (shown in containers where you can create objects)

  This bar has a tooltip that shows the total amount of disk space allotted to you.
- whether other users have this container open
- the permissions you have in this container.

The status bar shows information such as:

- help for an object, such as a toolbar button or field on a form, that your cursor is hovering over
- a zoom control for content magnification, in objects such as messages
- date and time, in calendars.

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Changing window appearance

There are a number of ways you can customize the appearance of a window. The way you see the window the next time you open it depends on the permissions your administrator has given you for the window.

If you have permission to save changes

If you have permission to save changes to the window appearance, your changes are saved, and you will see your customized view the next time you open this window. Other users will also see your customized view.

If you don't have permission to save changes

If you don't have permission to save changes to the window appearance, you will see the default appearance for this window the next time you open it. The only exception involves changes to List view, such as grouping or ungrouping columns.

Making changes in List view

If you make List view changes in containers where you don't have permission to save changes, your changes are reflected in your view of all the other windows for which you don't have permission to save changes. Other users won't see your customized view.

Note
You can make List view changes separately for upper and lower panes. In containers with no split bar, you are looking at the upper pane, so you will see any changes you made to an upper pane in another conference.

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Moving split bars

Window panes are divided by a split bar. The split bar between panes can be horizontal or vertical. It can also be located at the top, bottom, left, or right of the window, so that you only see one pane, even though there are two.

You can move the split bar by dragging it, or in the following ways:

- to make the split bar vertical, choose View > Split > Split Vertical
- to make the split bar horizontal, choose View > Split > Split Horizontal
- to remove the split bar, so that there is only one pane, choose View > Split > No Split.

  If you create a new conference or folder, there is no split bar by default.

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Hiding the status bar

FirstClass normally displays the status bar. To hide this bar, choose View > Toolbars > Hide Status Bar.

To show the status bar again, choose View > Toolbars > Show Status Bar.

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Resizing windows

You can resize FirstClass windows just as you would any other windows.

In addition, you can optimize the size of a window so that it just fits the window contents. To do this, choose View > Smart Zoom (Windows) or Zoom Window (Mac OS, Mac OS X). This is not applicable to Linux.

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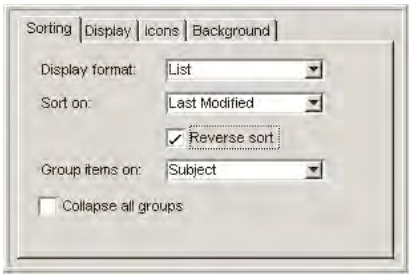
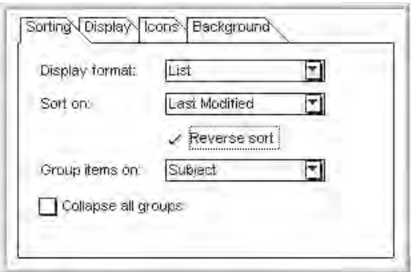
Switching between 3D and non-3D

FirstClass looks like this in 3D:



and like this in non-3D:



To see windows in 3D, select "3D look" in your general preferences.

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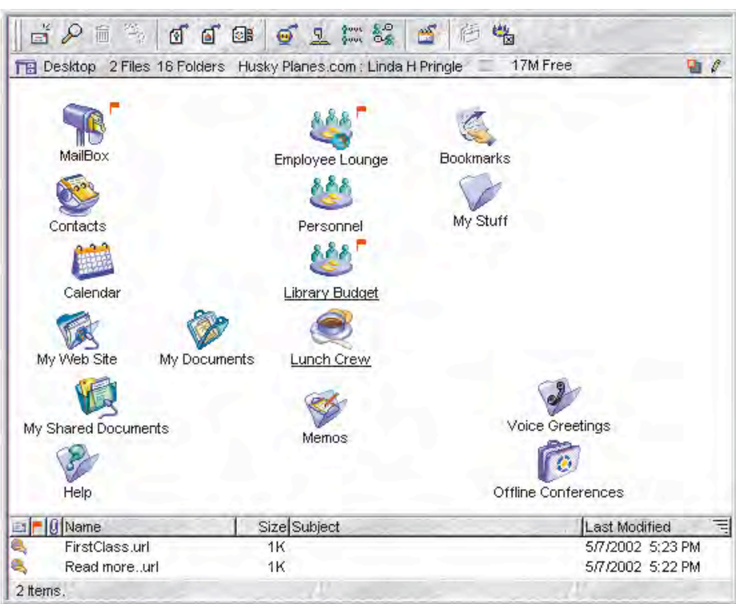
Changing window backgrounds

You can apply a background picture to certain areas of FirstClass windows, such as:

- toolbars
- column headings
- status bar
- certain dialog boxes.

The following example shows the areas in a window that are affected:



To apply a window background:

- you must display these windows in 3D
- the pictures you want must be stored on your server by your administrator, or you must store them in the Rules & Resources folder for a container (the best place to store them), in your

FirstClass Images folder, or in your settings file.

To apply a background picture:

1 Select "Use forms background" in your general preferences.

2 Choose the picture you want at "Image".

Notes
To change the background of the data area of your Mailbox or another container, you must make the change on a pane-by-pane basis.

If you notice that FirstClass is slower after you apply a background picture, you may want to remove this picture. It takes a little more time to open a window containing a picture.

Going to specific windows

To go to your Desktop when it is behind other windows or minimized, choose File > Open > Desktop.

To go to your Mailbox when it is behind other windows or minimized, choose File > Open > Mailbox.

To go to the next level up from your current window, choose Collaborate > Navigation > Up One Level.

To go to another open window, click the window as you normally do for your operating system or choose the window from the View menu (Mac OS, Mac OS X).

To bring all open FirstClass windows in front of any open windows from other applications, choose View > Bring All to Front (Mac OS X).

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About toolbars
Showing and hiding toolbars
Moving toolbars
Adding toolbar buttons
Changing the order of toolbar buttons
Displaying text on toolbar buttons
Removing toolbar buttons
Resetting toolbars to the default
About the editing toolbars

About toolbars

Each type of FirstClass window has its own toolbar. Toolbar buttons provide shortcuts to a number of common commands. These buttons are an alternative to choosing a command from the menu. You can specify which buttons are on a toolbar, the order in which they appear, and whether they include text.

Toolbar buttons have tooltips that show the button name. A fuller description is provided at the same time in the status bar.

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Showing and hiding toolbars

To show a toolbar, choose View > Toolbars > Show Toolbar.

To hide a toolbar, choose View > Toolbars > Hide Toolbar.

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Moving toolbars

To move a toolbar, drag the handle at the left side of the toolbar (or at the top, if the toolbar is vertical).

You can drag the toolbar to the top, bottom, left, or right side of the window.

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Adding toolbar buttons

To add a button to the toolbar:

1 Choose View > Toolbars > Customize Toolbars.

2 Locate the button you want by choosing the appropriate category at "Categories".

For example, to locate the Clear button, choose Edit.

As is the case for buttons already on the toolbar, buttons in the "Buttons" field have tooltips containing the button names. A fuller description is displayed at the same time at "Description".

3 Drag the button you want to the desired location on the toolbar.

To add a spacer between buttons, drag the spacer symbol located under "Spacer" to the desired location on the toolbar.

Tip
With the Customize Toolbars form open, you can also drag buttons from one toolbar to another. Dragging a button moves it. Control-dragging (Windows, Linux) or Option-dragging (Mac OS, Mac OS X) a button copies it.

You can also add FirstClass objects to toolbars.

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Changing the order of toolbar buttons

To change the order of buttons on a toolbar:

1 Choose View > Toolbars > Customize Toolbars.

2 Drag the buttons and spacers on the toolbar to their new locations.

3 Click Close on the Customize Toolbars form.

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Displaying text on toolbar buttons

By default, FirstClass displays only icons on toolbar buttons. To display text as well as icons on those buttons where text is available, choose View > Toolbars > Display Icons and Text.

To remove text from toolbar buttons, choose View > Toolbars > Display Icons Only.

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Removing toolbar buttons

To remove a button from the toolbar:

1 Choose View > Toolbars > Customize Toolbars.

2 Drag the button from the toolbar to the "Buttons" field on the Customize Toolbars form.

You do not need to go to the category that contains this button.

To remove a spacer, drag it from the toolbar to the "Spacer" field.

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Resetting toolbars to the default

To reset the active window's toolbar to the shipped default, choose View > Toolbars > Reset Toolbar.

This affects all toolbars of the same type.

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About the editing toolbars

FirstClass normally displays editing toolbars when an editable message or document is open. These bars consist of an edit bar that contains controls for formatting contents, and a ruler that shows margins, indents, and tab stops. You can work with the buttons on the edit bar just as you can with the buttons on other toolbars.

To hide the edit bar, choose View > Toolbars > Hide Edit Bar. To show this bar again, choose View

> Toolbars > Show Edit Bar.

To hide the ruler, choose View > Toolbars > Hide Ruler. To show the ruler again, choose View > Toolbars > Show Ruler.

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About conferences
What you can do in conferences
Approving messages in conferences

About conferences

A conference lets a number of users exchange information online. You can send a message to a conference just as you would send a message to another user. You can also open a conference and read the messages posted there by others. A conference icon is flagged when the conference contains unread mail.

Conferences can be created by your administrator or by yourself or other users. On your Desktop, you will only see those conferences which you have created or placed there, or to which you have been subscribed. You can also see any subconferences within a conference to which you have been subscribed. If there is another conference that you want to see on your Desktop, ask the conference owner to subscribe you to it.

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What you can do in conferences

The conference owner determines what you can do in a conference.

For example, you may only be able to read messages in a conference that covers personnel policies, but be able to send messages to a conference that deals with a project that you are working on. In this case, the personnel conference serves as a way to broadcast information. The project conference lets everyone involved in the project discuss it.

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Approving messages in conferences

A conference may be moderated. This means that either all messages sent to the conference, or messages with attachments, cannot be read until a moderator opens and approves them. Unapproved messages appear in italics in the list of conference items.

Only someone given permission to act as moderator for a conference can approve messages.

To approve a message, choose Collaborate > Approve.

Note
Approve is a toggle command.

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About folders
Creating folders
Moving messages into folders

About folders

You can create folders to store and organize your messages and documents. These folders work like the ones you are used to in your operating system.

You can nest folders within containers.

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Creating folders

To create a folder:

1 Open your Mailbox, or a container where you have permission to create subfolders.

2 Choose File > New > New Folder.

A New Folder icon is displayed in the upper pane of the window.

3 Name your new folder.

Open the folder's properties, then type the folder name at "Name". You can also change other information on the Info form.

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Moving messages into folders

You cannot address messages directly to folders. The only way to get messages into folders is to move them there.

The default expiry date for messages in a folder is determined by the default set for the conference within which the folder is located; therefore, moving a message into a different folder may change its default expiry date.

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[Setting preferences](#)
[Changing your client's time zone](#)
[Making FirstClass your default mail client](#)
[Customizing how FirstClass looks on your web browser](#)

Setting preferences

You can customize how FirstClass behaves in a number of ways. For example, you can change default fonts, apply background pictures to forms, connect to a particular window, and create an automatic reply for mail.

To change a preference:

1 Choose Edit > Preferences.

Mac OS X
Choose FirstClass > Preferences.

2 Click the tab on the Preferences form that contains the preference you want to change.

3 Make the change.

To change a preference without closing the Preferences form, click Apply.

To reset all preferences to the FirstClass defaults, click Default.

Caution
When you click Default, all your preferences will be reset, not just the ones showing on the visible tab.

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Changing your client's time zone

By default, your client displays dates and times in the same time zone as your server. It does not use the time clock on your computer.

If you are in a different time zone than your server, you will need to adjust your client's time zone so that dates and times display in your local time. To do this, choose the appropriate time zone at "Time zone" in your viewing preferences. Make sure you choose the time zone that applies to your exact location.

Note
FirstClass automatically adjusts for standard and daylight savings times.

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Making FirstClass your default mail client

By default, FirstClass is not used to send and receive Internet mail; it is kept separate from your Internet connection. If you make FirstClass your default mail client, FirstClass:

- sends and receives Internet mail
- can use mailto links.

To make FirstClass your default mail client, select "Register FirstClass® as default mail client" in your general preferences.

Mac OS X

If you don't see this field, you must choose your default mail application through the Mac OS X system preferences.

Reverting to your browser's mail client

If you made FirstClass your default mail client, but now want to use your web browser instead, start up your browser, then make it your mail default.

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Customizing how FirstClass looks on your web browser

You can specify how FirstClass will look, and the features available to you, when you use a web browser to connect to your server. This only affects your own view.

Note
Your administrator determines the appearance and features that will be available to web browsers. Depending on what your administrator has made available, your choices may not work.

To customize FirstClass on your web browser, update your FirstClass web preferences.

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About the FirstClass Directory
Narrowing the Directory list
What you can do from the Directory

About the FirstClass Directory

The FirstClass Directory is the place on the server that stores information about users and objects to which you can address mail. You can open the Directory to view who and what is in it. It also lets you address mail just by typing the name of a user or object.

The Directory contains addresses for:

- all users who are registered on this server

  For example, if your organization has one server, all users in your organization who are registered on your server are listed. The groups to which they belong are also shown, if this information was entered by your administrator.

- your personal addresses and mail lists

  These are created by you. You will only see personal addresses and mail lists that you added, not other users' personal addresses and mail lists.

- conferences, gateways, and calendars known to this server.

Notes
Some Directory entries may not be visible to you because your administrator can customize your view of the Directory. In addition, any entries defined as unlisted do not appear in the Directory. Names in bold are currently logged in. Names in italics will not accept instant messaging invitations.

Opening the Directory

To open the Directory, choose Collaborate > Directory.

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Narrowing the Directory list

You can reduce the number of entries shown in the Directory list by:

- requesting only certain categories of entries
- requesting only names that match a search pattern.

The Directory window contains checkboxes for three categories:

- local (the users who are registered on your server, plus your personal addresses and mail lists)
- remote (users who are registered on other servers that are gatewayed to your server)
- conferences (includes calendars).

To remove all entries for a category from the list, clear the appropriate checkbox.

To list only names that match a search pattern, type the search pattern at "Pattern". For example, to list only those entries with a first or last name of Alan, type something like `al`. To find the entry for Alan Grady, type the entire name or something like `al gr`.

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What you can do from the Directory

You can open the shortcut menu from an entry to do the following:

- view the entry's résumé
- view the entry's Directory information

  Choose Open User Info Form. To see this information, you must have permission to view user information.
- view the entry's calendar
- create a preaddressed message to the entry
- send an instant message invitation to the entry.
- call the entry.

You can also view the entry's shared documents.

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How to tell who is online
Hiding your presence
Seeing who has a container open

How to tell who is online

All names in bold are currently connected to your server.

Note
Names in italics won't accept instant message invitations.

You can also see a list of users who are online by choosing Collaborate > Who's Online.

To jump directly to the first name in the Who's Online list that begins with a particular letter, type that letter. You can also type a user's first name to jump directly to the first occurrence of that name.

You can do the same things from the Who's Online list, such as sending a message to a user, as you can do from the Directory.

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Hiding your presence

If you don't want everyone to know when you are online, you can limit who is able to see this information. To do this, choose the group of users for whom you want to show your presence at "Show presence to" in your instant messaging preferences.

When you are online, users in the groups not selected at "Show presence to" won't see your name in bold, and you won't appear in their Who's Online list.

Exceptions
Your administrator can always tell when you are online.

If a show presence preference has been set for your user group, that will override any choice you make.

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Seeing who has a container open

Icons on a container's summary bar indicate whether other users have the container open. To see a list of who has the container open, click the icons:

From the list, you can do the same things as you can from the Directory.

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FirstClass Views

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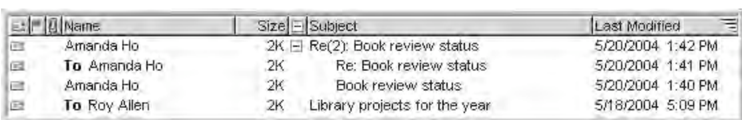
Window pane views

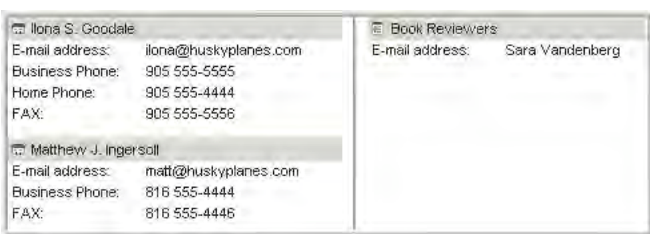
You can view the objects in a window [pane](#) as large icons:

small icons:

a multicolumn list:



or an Index Card view:



Normally, a two-pane window with a horizontal scroll bar shows objects in the upper pane as large icons and objects in the lower pane as a list.

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Changing the view

To change the view for a window pane:

1 Click the pane you want to change.

2 Specify the view you want.

To see large icons, choose View > View by Icon. To see small icons, choose View > View by Small Icon. To see a multi-column list, choose View > View by List. To see entries laid out like cards, choose View > View by Index Card (a particularly useful display for personal contacts information).

You can also choose the view you want at the "Display format" field on the Sorting tab of the View Properties form.

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Changing view properties

Many of the changes you can make to a window pane involve changing view properties. To do this:

1. Click the window pane you want to customize.
2. Choose View > Change View Properties.
3. Click the tab on the View Properties form that contains the property you want to change.
4. Make the change.

To change a property without closing the View Properties form, click Apply.

To reset all view properties to the FirstClass defaults, click Default.

Note
Be cautious about clicking Default. All your view properties will be reset, not just the properties showing on the visible tab.

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Changes you can make in all views

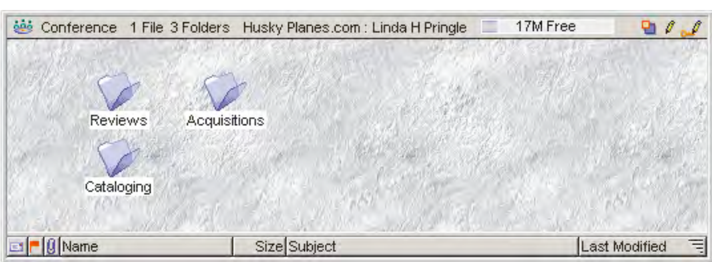
Changing text properties

To change the text appearance in a window pane, update the "Font", "Size", and "Use color" fields on the Display tab of the View Properties form.

Using a picture as a background

You can apply a picture as the background of a window pane (such as the top pane of your Desktop). The same limitations apply as for adding backgrounds to certain areas of FirstClass windows:

The following example shows a top pane with a customized background:



To change the background of a pane, update the Background tab of the View Properties form.

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Moving icons
Locking icon positions
Showing the background behind icon titles
Hiding icon titles

Moving icons

You can move an icon in the following ways:

- drag it

  Once you start to drag an icon, its horizontal and vertical position (number of pixels from the top and left side of the window pane) are displayed in the status bar.

- move it one pixel at a time

  Select the icon, then press Control-Shift (Windows, Linux) or Option (Mac OS, Mac OS X) while using the arrow keys. As is the case for dragging, the icon's horizontal and vertical position is shown in the status bar.

- specify its horizontal and vertical position.

  Open the icon's object properties, then update the "Horizontal position" and "Vertical position" fields.

Aligning icons to the grid

You can tidy up icons by aligning them to an invisible grid. To do this:

1 Click the window pane.

2 Choose View > Line Up Icons to Grid.

If you can't move an icon

If you can't move an icon, check whether:

- your administrator has not given you permission to move objects
- the icon is protected
- you have "Lock icon positions" selected on the Icons tab of the View Properties form.

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Locking icon positions

To lock icons in position so that they cannot be moved, select "Lock icon positions" on the Icons tab of the View Properties form.

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Showing the background behind icon titles

If you apply a background image to a pane, you will notice that icon titles have a white background. As you can see from the example of the pane background above, this is useful for readability when backgrounds are dark or busy.

If you do not want this white background, select "Transparent text" on the Background tab of the View Properties form. Your icon will then look something like this:

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Hiding icon titles

If you do not want to see the text associated with an icon, select "Hide icon titles" on the Icons tab of the View Properties form.

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Changing text color
Hiding column headings
Resizing columns
Changing column order
Showing gridlines
Showing row numbers
Sorting items
Grouping items
Selecting the columns to display

Changing text color

You can color code the text of items in List view (for example, to highlight items that you want to deal with later).

To make the text of a selected item another color, choose Format > Color, then the color you want.

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Hiding column headings

By default, List view shows headings at the top of each column. If you do not want column headings, clear "Show column titles" on the Display tab of the View Properties form.

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Resizing columns

To change the width of a column, position the cursor over the edge of the column heading until the cursor looks like a double-ended arrow, then drag the column heading edge to make the column wider or narrower.

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Changing column order

To change the order in which columns are displayed, drag column headings to the desired location.

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Showing gridlines

To show horizontal gridlines that separate the rows in List view, select "Show horizontal gridlines" on the Display tab of the View Properties form.

To show vertical gridlines that separate the columns in List view, select "Show vertical gridlines" on this tab.

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Showing row numbers

To show row numbers to the left of rows in List view, select "Show row numbers" on the Display tab of the View Properties form.

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Sorting items

You can specify which column you want to sort on by clicking the appropriate column heading.

Another way to specify which column to sort on is to choose the column at "Sort on" on the Sorting tab of the View Properties form.

There are a few sorting rules to note:

- if you sort on Name, FirstClass sorts items by the name of the sender (for incoming messages) or receiver (for outgoing messages)
- if you sort on Flag, FirstClass sorts items in this order:
  - unsent messages
  - urgent incoming messages, by date
  - normal incoming messages, by date
  - urgent outgoing messages, by date
  - normal outgoing messages, by date
- if you sort on Attachment, FirstClass lists messages that include attachments first.

Reversing sort order

To reverse the sort order of the column on which you are sorting, click the column heading.

You can also reverse sort order by selecting "Reverse sort" on the Sorting tab of the View Properties form.

Showing the newest item first

To list items from newest to oldest, select "Show newest items first" in your viewing [preferences](#).

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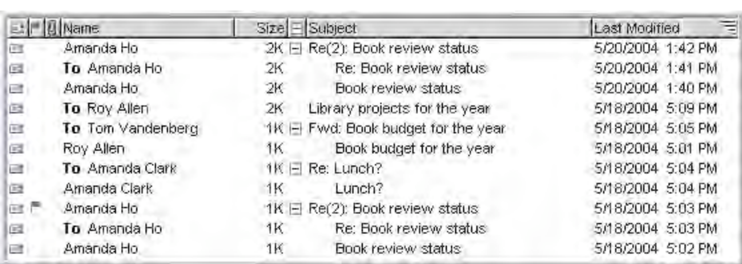
Grouping items

You can group all items by a column, such as Name or Subject. This puts the items with the same name or subject together. For example, this is a Mailbox grouped by subject:



A grouping column is displayed to the left of the Subject column in this example. The grouping column shows tree view buttons (Windows, Linux) or disclosure triangles (Mac OS, Mac OS X) beside grouped items.

To group items for a particular column, Control-click (Windows, Linux) or Option-click (Mac OS, Mac OS X) the appropriate column heading.

Another way to specify which column to group on is to choose the column at "Group items on" on the Sorting tab of the View Properties form.

To remove grouping, Control-click or Option-click the grouping column heading.

There are two grouping rules to note:

- if you use both sorting and grouping, FirstClass keeps groups together and sorts the list as a whole by the first item in each group

  Items are also sorted within each group.

- if you group the Subject column, FirstClass groups messages by message threads, rather than alphabetically by subject.

Caution

If you collapse a group of items, then move or delete the displayed top item in the group, all items in the group are moved or deleted.

Collapsing and expanding groups

To collapse a group so that you only see the first item in the group, click the button/triangle beside the group.

To expand a collapsed group, click the same button/triangle.

To collapse or expand all groups, click the grouping column heading. You can also collapse or expand all groups by using the "Collapse all groups" field on the Sorting tab of the View Properties form.

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Selecting the columns to display

You can specify which columns you want to see, and in what order. To do this:

1. Choose Select Fields from the shortcut menu.
2. Update the Select Fields form.

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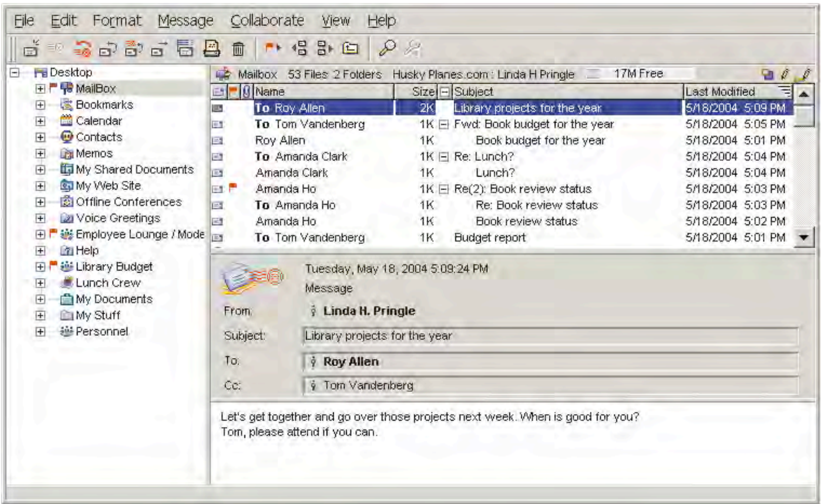
[About Explore view](#)
[Opening messages sequentially](#)
[Starting in Explore view by default](#)

About Explore view

FirstClass includes several versions of an Explore view. If you are not already in Explore view, you can display the container you currently have open or selected in a separate Explore view window by choosing View > Explore.

Note
If you want to see an open container in Explore view, make sure nothing is selected before you choose this command. If an object such as a message is selected, you can't choose this command. If a container is selected, that is the container you will see in Explore view.

The standard Explore view looks like this:



The left [pane](#) shows [containers](#) in a hierarchical view. You can open and close these containers to reveal any subcontainers, just as you normally do in your operating system.

Tip
To list all objects in a container in the hierarchical view, including ones that have been hidden or moved to the toolbar, Shift-click the tree view button (Windows, Linux) or disclosure triangle (Mac OS, Mac OS X) beside the closed container.

Note
In the standard Explore view, objects open with a single click. If you choose File > Open > Open Selected or double-click an object, it opens in its own window. To select an object without opening it, press Control (Windows, Linux) or Command (Mac OS, Mac OS X) while clicking it. To open a link, double-click it.

The top right pane shows the contents of the object that you opened in the left pane. The contents of a container are shown in List view.

The bottom right pane shows the contents of the object that you opened in the top right pane. You can work with this object just as you could if you were not in Explore view.

You can drag items from the top right pane to the bottom right pane to open them. You can also drag items from the top right pane to a different container in the left pane to move them.

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Opening messages sequentially

While in Explore view, you can scroll through messages by clicking the top right pane, then pressing the space bar. Messages open in the bottom right pane. Each press of the space bar scrolls through message content, then opens the next message.

Unread messages are opened first, then each message is opened in order, starting with the last message in the selected container.

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Starting in Explore view by default

If you always want to start in Explore view when you log in, choose one of the following at "Client interface" in your viewing preferences:

- FirstClass Explore

  This is the standard Explore view described above.
- Explore No Preview

  This is the Explore view without the bottom right pane. To open an item such as a message, you must double-click it. It will open in a separate window.
- Explore Side by Side.

  This is the Explore view with all three panes side by side.

To revert back to FirstClass' standard look, choose FirstClass Classic.

Your changes to this field will take effect the next time you log in.

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Working with Objects

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Moving and copying objects
Deleting objects
Hiding objects
Opening objects with a single click
Working with multiple objects

Moving and copying objects

You can move objects by dragging them.

To copy an object, press Control (Windows, Linux) or Option (Mac OS, Mac OS X) while dragging it.

Note
If your administrator has not given you permission to move a particular object, FirstClass will try to create a link to the object instead.

When you move a message into a conference or your Mailbox, the message's expiry date changes to the default expiry date for objects in that location. You can reset the expiry date by changing the information about the message.

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Deleting objects

To delete an object, select it, then choose File > Delete or press Delete.

When you delete an object, that object is marked for deletion, but is not immediately removed from the server. FirstClass physically removes deleted objects when it collects the trash. Your administrator schedules trash collection times.

Deleting a folder, conference, or calendar also deletes all objects contained within.

Tip
If you need to delete a message that you sent to several conferences, go to your Mailbox and unsend the message, then delete it. If you do not unsend the message first, you will have to delete it from every location to which you sent it. In addition, you may not have permission to delete it from all conferences.

If you can't delete an object

If you can't delete an object, and you know that your administrator has given you permission to delete it, the object may be protected.

Restoring deleted objects

Before the trash is collected, you can restore a deleted object. To do this:

1 Open the window that contained the deleted object.

2 Choose View > Show Deleted Items.

All deleted objects that have not yet been removed during trash collection are displayed, with trash can icons beside them.

Note
You cannot open an object that is marked for deletion.

3 Select the object you want to restore.

4 Choose File > Undelete.

When you have finished restoring deleted objects, you can hide the objects that are still marked for deletion by choosing View > Hide Deleted Items.

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Hiding objects

To hide a selected object:

1 Open its properties.

2 Choose Hidden at "View".

Showing hidden objects

To list hidden objects, Shift-click the closed container in Explore view. To unhide one of these objects:

1 Select it.

2 Open its properties.

3 Choose Default or another location at "View".

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Opening objects with a single click

Normally, you open an object by double-clicking it.

Exception
In Explore view, objects open with a single click.

To make objects in a particular pane open with a single click using the FirstClass Classic interface, select "Open icons with single click" on the Icons tab of the View Properties form.

Note
Only the icon portion of an object is affected by this change. To select an object in this pane instead of opening it, click any text associated with the object (such as an icon's title). To move an object in this pane, drag its title.

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Working with multiple objects

You can select multiple objects using your operating system's normal selection commands.

In addition, you can select objects based on a common value, such as the same author or same date. This is a useful way to highlight likely objects when you are scanning a list for a particular object. To do this, choose Select Similar Items from the shortcut menu.

In List view, open this menu from an object with the value you want to select, in the column that contains this value.

In icon views, open this menu from the part of an object that shows the value you want to select (such as a flag).

For example, to select all messages with the subject "Budget", find a message with this subject, then open the shortcut menu from "Budget" and choose Select Similar Items.

Note
Selecting a subject actually selects a message thread. All messages in the thread are selected, even if the subject wording was changed.

To open multiple selected objects, choose File > Open > Open Selected.

Combining multiple objects

To view the combined contents of multiple selected objects such as messages or documents in a single window, choose Message > Summarize Selected. The objects are displayed one after the other in a temporary document that is no longer accessible after you close it.

Before you close this document, you can search it for specific text, print it, or save it.

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You can search containers for objects that contain specific text, or have attachments or histories that contain specific text. To do this:

1. Open the window you want to search.
2. Choose Edit > Find.
3. Fill in the find form.

   Keep in mind that the more narrowly you focus the search, the more relevant the search results are likely to be.

The search summary window opens. As objects are found, they are listed in this window.

Some facts about searching:

- the name of the object currently being searched is displayed in the top right corner of the search summary window
- you can open items in the search summary window before the search finishes
- searching takes place in the background; you can do other things in FirstClass during a search
- FirstClass notifies you with a sound when the search is complete
- you can cancel a search in progress by closing the search summary window.

[Specifying print layout defaults](#)

To print an open or selected object (or multiple selected objects) immediately, using your print layout defaults, click the Print toolbar button.

If you choose File > Print, your operating system's standard print form opens. This allows you to specify things such as the pages you want to print. Your print layout defaults are still used.

Exceptions
Printing works slightly differently for calendars and viewer windows. In addition, when you select objects, then choose File > Print and tell FirstClass to print your selections, printing takes place immediately.

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Specifying print layout defaults

You can specify what information you want to print for messages, documents, calendars, and personal addresses and mail lists. In addition, you can specify how you want this information laid out on the printed page.

To specify print layout defaults for any of these objects:

1 Choose File > Print Layout.

2 Specify the print layout defaults on the appropriate tab of the Print Layout form.

To specify a default without closing the Print Layout form, click Apply.

To reset all print layout defaults to the FirstClass defaults, click Default.

Caution
When you click Default, the defaults for all objects will be reset, not just the defaults showing on the visible tab.

To specify print options such as paper size, source, and orientation, click Setup.

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Related topics

[Downloading files attached to messages]
[Copying stored files to your computer]
[Importing and exporting personal addresses]
[Importing and exporting calendar items]
[Exporting memos]

You can save a copy of a FirstClass object to your computer. This not only saves the object contents, but makes the information usable by other applications, such as a word processor. FirstClass objects are saved as plain text files, and all formatting is lost.

Note
Files attached to message are not saved when you save a message. You must download attached files separately.

To save an object to your computer:

1 Open the object.

You must open the object, rather than just selecting it, or the list containing the object will be saved instead.

Note
If you choose to save the list, it is saved as a plain text file that is tab delimited.

2 Choose File > Save As.

3 Choose the location and name for the saved file.

Changing information for closed objects
Changing information for open objects
Changing information for messages in multiple locations
Protecting objects
Making objects open automatically

Changing information for closed objects

You can change some information, such as name, icon, and expiry date, without opening an object. To do this:

1 Select the object.

2 Choose File > Properties (Windows, Linux) or Get Info (Mac OS, Mac OS X).

3 Change information on theInfo form as required.

Shortcut
To change the name, subject, or any other displayed information, click the information twice (slower than a double-click), type the new information, then press Enter/Return.

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Changing information for open objects

For objects with an editable header, such as unsent messages, you can change information such as name, subject, and icon directly in the header.

To undo all changes made to an open object, choose Edit > Revert to Saved.

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Changing information for messages in multiple locations

If you send a message to two conferences, the message is stored in your Mailbox, with links to the message in the two conferences. Each instance of the message, whether the original message or a link, has its own set of information.

Changing the information in one of these locations doesn't change the same information in any other location. You may change the subject of the message in your Mailbox, but the original subject will remain in the conferences. Also, you may not have permission to change information in certain conferences, even though you sent the message.

If you need to change information in all locations, go to your Mailbox and unsend the message, change the information, then send the message again.

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Protecting objects

To protect an object so that it can't be changed, moved, or deleted, select "Protected" on the object's Info form.

To unprotect an object, clear this field.

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Making objects open automatically

You can make an object open automatically whenever it is unread (or contains unread items) and the container in which it is located is opened. This is useful, for example, for providing a document that describes the parent container. The first time someone opens this container, the document opens immediately.

The following objects can open automatically:

- an unread object, such as a message
- a container that contains unread objects
- an unread link to another object (the target object).

  The link opens the target object.

To make an object open automatically, select "Auto open" on the object's Info form.

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Changing object locations using the Info form
Creating links on toolbars

Changing object locations using the Info form

By default, a FirstClass object such as a message or document appears in the lower pane. A container appears in the upper pane. You can change the location of an object in a window by updating its properties.

Objects can be placed in the following locations in a window:

- in the upper pane
- in the lower pane
- on the toolbar as a button

  The button's tooltip displays the object's subject.
- in the default location for that type of object.

This means, for example, that you can place an object that you want to be immediately accessible, like a "Rules for posting" document, in the upper pane.

To change the location of a selected object:

1 Open its properties.

2 Choose the location you want at "View".

You can move an object that was placed on the toolbar as a button by clicking the button to open the object, then opening the object's properties and changing the location.

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Creating links on toolbars

To add a link to a FirstClass object to a toolbar, drag the target object to the toolbar.

To add a link to a web page to a toolbar, drag the icon beside the target web page's address field to the toolbar.

To see the URL for a link on a toolbar, press Control (Windows, Linux) or Option (Mac OS, Mac OS X) as you display the link's tooltip.

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Changing your Mailbox permissions
Creating mail handling rules

Changing your Mailbox permissions

You can update the permissions on your Mailbox to:

- stop messages above a certain size from being accepted
- limit the number of messages stored
- specify when messages expire
  Expired messages are deleted automatically.
- control specific users' access to your Mailbox.

To update your Mailbox permissions:

1 Select or open your Mailbox.

2 Choose Collaborate > Permissions.

3 Update the Mailbox Permissions form.

Your changes are saved automatically when you close this form.

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Creating mail handling rules

You can create mail rules that tell FirstClass how to handle the messages in your Mailbox. For example, FirstClass could send mail containing the word "budget" in the subject to a subfolder called Budgets.

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Adding picture files to Rules & Resources
Using picture files from Rules & Resources

You can add resources to a container's Rules & Resources folder, then use those resources to customize the look of the container, just as your administrator customizes containers.

The resources can be:

- picture files

  Picture files can be used as backgrounds in the container's window panes.
- resource files (.rez).

  A resource file is normally added by your administrator. It can contain customized pictures, icons, forms, and sounds. These resources automatically replace the standard resources used by the container.

The advantage to storing resources in a container's Rules & Resources folder, instead of in a settings file or your client's Images folder, is that FirstClass keeps track of the version of any resources in the Rules & Resources folder.

This means that FirstClass will automatically update any resource when it detects that someone trying to view the resource has a copy that is older than the version in the Rules & Resources folder.

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Adding picture files to Rules & Resources

To add a picture file to a container's Rules & Resources folder:

1. Select or open the container.
2. Choose Collaborate > Rules.
3. Drag the picture file to the Rules & Resources folder.

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Using picture files from Rules & Resources

You can use a picture file that is stored in a container's Rules & Resources folder as a window pane background. The only difference from the normal procedure for doing this is that you can't pick the picture file from the list at "Image" on the Background tab of the View Properties form. You must type the file name (for example, mypicture.jpg) instead.

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Creating conferences
Setting conference permissions
Specifying mail handling rules for conferences
Providing information about conferences
Updating conferences' Directory entries

Creating conferences

You can create conferences just as your administrator does. If you have trouble getting your conferences to work as you expect, contact your administrator.

To create a conference:

1 Open the container where you want the conference.

2 Choose File > New > New Conference.

3 Open the conference's properties, then type the conference name at "Name".

You can update other information on the Info form, if desired.

Shortcut
Click the name of the New Conference icon twice to make it editable, type the conference name, then press Tab.

4 Set conference permissions.

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Setting conference permissions

To specify the permissions for your conference:

1 Select or open the conference.

2 Choose Collaborate > Permissions.

3 Update the Permissions form.

Your changes are saved automatically when you close this form.

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Specifying mail handling rules for conferences

You can set up mail rules that tell FirstClass how to handle mail received by a conference.

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Providing information about conferences

You can provide other users with information about a conference by creating a résumé for it. To do this:

1 Choose Collaborate > Permissions with the conference open or selected.

2 Click About.

3 Update the Personal Address form.

Your changes are saved automatically when you close this form.

To see conference information, users can select your conference, then choose Collaborate > About Conference.

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Updating conferences' Directory entries

A conference's Directory entry shows you information that includes the conference location and whether it can be viewed when users see Directory lists. You can update certain conference information. To do this:

1 Choose Collaborate > Permissions with the conference open or selected.

2 Click Directory.

3 Update the Directory Information form.

We recommend that you unlist your conferences so that they aren't visible in Directory lists.

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Subscribing conferences to mailing lists
Writing to mailing lists

Subscribing conferences to mailing lists

You can use conferences as access points to Internet mailing lists.

When you subscribe a conference to a mailing list, messages sent to the mailing list will appear in the conference.

Each mailing list has its own instructions for subscribing. In some cases, you send a subscription request and the mailing list returns a reply saying the conference is subscribed. In other cases, you must respond to the mailing list's reply before the conference is subscribed.

To subscribe a conference to a mailing list:

1 Choose Collaborate > Permissions with the conference open or selected.

2 Click Message.

3 Send the subscription request as instructed by the mailing list.

The mailing list will send a reply to the conference.

If you need to respond to this reply

4 Copy the text of the mailing list's reply.

5 Click Message on the Permissions form.

6 Paste the copied text into your response.

If necessary, copy and paste the subject line as well.

7 Send the response.

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Writing to mailing lists

Some mailing lists let anyone write to them. In this case, you and others using a conference can just send messages to the mailing lists, or respond to mailing list messages in a conference.

Other mailing lists only let registered users write to them. These mailing lists consider the actual conference to be the registered user, not you or others using the conference. This means that you cannot send messages directly to a mailing list, or respond to mailing list messages directly from the conference. To write to these mailing lists, you must use the Message button on the conference Permissions form.

Sending commands to mailing lists

As well as sending messages to mailing lists, you can send commands such as help commands or requests for information about who is subscribed. These commands must be sent using the Message button on the conference Permissions form.

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About links
Creating container links to your own server
Creating container links to other servers or web pages
Creating bookmarks

About links

A link is an object that you click or double-click to open another FirstClass object or a web page. You can create the following types of links:

- links in containers:
  - links to your own server

    These links provide shortcuts to objects on your own server. You can create them on your Desktop or in other containers.
  - links to other servers or web pages

    These links provide shortcuts to objects on other FirstClass servers or to web pages. You can create them on your Desktop or in other containers.
  - bookmarks

    These can be either links to your own server or to other servers or web pages. The only thing that differentiates them from the other types of links in containers is that they are created in your Bookmarks folder. You can also move the other types of container links into your Bookmarks folder for convenience.
- links on toolbars

  These can be either links to your own server or to other servers or web pages.
- links in message or document content.

Renaming or deleting links

You can rename or delete a link, and this will have no effect on the original object.

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Creating container links to your own server

To create a link on your Desktop:

1. Select the object to which you want to link (the target).
2. Choose Collaborate > Add to Desktop.

To create a link in another container, press Shift and drag the target to the desired container. You can also use this method as a quick way to create a link on your Desktop.

Locating a link's target

To find out where a link's target is located, open the link's properties. The path to the target is displayed at "Where".

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Creating container links to other servers or web pages

To create a link to a web page

1 Open the container where you want to save the link.

2 Go to the target web page.

3 Drag the icon beside the web page's address field to the lower pane of the container where you want to save the link.

The link icon will look like this:

4 Change or add link information if desired.

To change the name or add a subject, for example, open the link's properties, then update the Info form.

To create a link to an object on another FirstClass server

1 Open the container where you want to save the link.

2 Log into the server that contains the target.

3 Drag the target to the lower pane of the container where you want to save the link.

The link icon will look like this:

4 Change or add link information if desired.

To change the name or add a subject, for example, open the link's properties, then update the Info form.

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Creating bookmarks

If you don't see a Bookmarks folder on your Desktop, opening the folder using the menu command below, or creating a bookmark, will add it.

To create a bookmark:

1 Choose File > New > New Bookmark.

 Shortcut
Select the object you want to bookmark, then choose Collaborate > Add to Bookmarks. This prefills the bookmark information.

The Info form for the bookmark opens.

2 Update the Info form if required.

If you did not select an object to bookmark, be sure to supply the full path to the object at "URL" on the Advanced tab.

The bookmark is added to your Bookmarks folder.

Using bookmarks

To use a bookmark:

1 Choose File > Open > Bookmarks or double-click the Bookmarks folder.

2 Double-click the bookmark for the object you want to open.

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Working with Concepts

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Changing magnification

To make content always look bigger or smaller when you read objects, type the percentage by which you want to enlarge or reduce it at "Content zoom" in your content view preferences.

A value less than 100% shrinks content; greater than 100% enlarges content.

This preference only affects the size as you view it. The original size is used when content is printed.

To temporarily change the magnification for a particular object, choose or enter the magnification using the zoom control on the status bar. The next time you open this object, it will display at your default magnification.

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Changing display mode

By default, FirstClass shows content that you created, and unformatted content (such as plain text in Internet messages), in the display mode you chose at "Content view" in your content edit preferences.

To use the standard editing view, where content fits the window size, choose View > Content > Normal View.

To see how content would look when printed, choose View > Content > Page Width View. Content is positioned as it would be on printed pages.

To see how content would look when shown as slides in a presentation, choose View > Content > Presentation View. Content is positioned as it would be on slides.

If you can edit the object, your choice of display mode is saved with the object.

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[Using picture files as backgrounds](#)
[Pasting pictures into backgrounds](#)
[Working with background pictures](#)
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Applying background colors

To apply a background color for your content:

1 Choose Format > Format Background.

2 Select "Use color" and choose the color you want.

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Using picture files as backgrounds

To use a picture file as a background for your content:

1 Choose Format > Format Background.

Shortcut
If you do not need to specify the placement of the background picture, you can choose Edit > Insert > Insert Background Image, then select the picture file. The picture is tiled.

2 Update the fields on the Format Background form that apply to images.

Top

Pasting pictures into backgrounds

If you have a picture copied to your clipboard, you can use it as a background for your content. To do this:

1 Place the cursor in the content.

2 Choose Edit > Paste Special.

3 Choose the file format you want FirstClass to assign to this picture.

Pictures are given a file format, even when they are pasted from the clipboard, so that you or others can subsequently save the picture files to your computers.

4 Select "Paste as background image".

The picture is tiled. If you do not want a tiled background, choose Format > Format Background and choose the placement you want at "Image position".

Top

Working with background pictures

You can open a background picture in a separate viewer window that does not display the content on top of it. To do this:

1 Choose Format > Format Background.

2 Click Open.

For information on what you can do in the viewer window, see Embedding pictures in content.

Top

Saving background picture files

If an object's content has a background picture, you can save the picture file to your computer. To do this:

1 Choose Format > Format Background.

2 Click Save As.

3 Select the folder where you want to save the file.

The file is saved in its original format.

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About object content
Copying content from other sources
Inserting horizontal lines
Inserting page breaks

About object content

You can add, edit, and format content for FirstClass objects such as documents, messages, and calendar events and tasks.

This content is located in the body (the bottom section) of the object. It can consist of elements such as text, embedded pictures or other files, and links. To type content, click the body of the object, then start typing.

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Copying content from other sources

You can copy content from another message, document, or an external file created in another application in two ways:

- copy the content to the clipboard and paste it into the body of your new object as you normally do in your operating system
- select the content, then Control-drag (Windows, Linux) or Option-drag (Mac OS, Mac OS X) it to the body of your new object.

Notes
If you just drag content from an unsent message, a document which you are allowed to edit, or an external file, you will move it instead of copying it.

If you want to copy all content from an external file that is in a format FirstClass recognizes (.txt or .rtf), you can drag the file, unopened, to the body of your new object. This copies the content rather than moving it, so the external file remains unchanged.

To control the format in which FirstClass pastes content:

1 Copy the content to the clipboard.

2 Click where you want to paste the content.

3 Choose Edit > Paste Special.

4 Choose the format you want.

Tip
To copy text from a web page and be sure that it pastes successfully, use Paste Special and select "Plain Text".

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Inserting horizontal lines

You can insert a horizontal line to visually break up content or to force content below the horizontal line to align with the left margin.

To insert a horizontal line, choose Edit > Insert > Insert Horizontal Line. A line is drawn below the current cursor position, and the cursor and any subsequent content drop below this line.

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Inserting page breaks

To insert a page break, choose Edit > Insert > Insert Page Break.

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Editing content
Undoing editing changes
Spell checking text
Searching for text
Replacing text

Editing content

You can use standard editing functions such as copy, cut, and paste on your content.

To move content (such as text or a picture) from one place to another within your object, select it, then drag it to the desired location. If you press Control (Windows, Linux) or Option (Mac OS, Mac OS X) as you drag, you will copy the content instead of moving it.

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Undoing editing changes

Immediately after you have made a change in the body, you can undo it by choosing Edit > Undo *Operation*.

Redoing editing

To redo editing that you have just undone, choose Edit > Redo *Operation*.

Undoing all changes

Remember that if you are working on an object that you created and saved previously, you can undo all changes that you have made while this object was open by choosing Edit > Revert to Saved. This affects content as well as information in the header.

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Spell checking text

To check the spelling of your text, choose Edit > Check Spelling with the object open. To spell check only part of the text, select that part before choosing this command. Hyphenated words are checked as separate words.

FirstClass checks spelling based on the spell checking options in your content edit preferences. You can also set your preferences so that FirstClass checks the spelling of every message when you send it.

If FirstClass encounters a word it does not know, it opens the Spell Checker form. This form contains choices for handling the word.

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Searching for text

To search for specific text in your content:

1 Open the object you want to search.

2 Choose Edit > Find.

3 Update the Find form.

4 Click Find Next to search forward, or Find Previous to search backward, from the cursor position. FirstClass scrolls to the first occurrence it finds of your text and highlights it.

5 Continue clicking Find Next or Find Previous until "None found" is displayed in the Find form.

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Replacing text

To replace occurrences of specific text in your content with new text:

1 Open the object.

2 Choose Edit > Replace.

Note
If you are searching for text, you can also click Replace in the Find form to open the Replace form.

3 Update the Replace form.

4 Click Replace All to replace all occurrences of the old text automatically.

You can also click Find Next or Find Previous to find the first occurrence of the old text. Click Replace to replace this text or Find Next/Find Previous to skip this text.

When there are no more occurrences of the old text, "None found" is displayed in the Replace form.

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About formatting content

FirstClass works in a similar manner to most word processing software. You can change the margins for all the content, format paragraphs, and format selected text.

In FirstClass, you can select text in the standard ways used by your operating system. These are some of the ways you can select text:

- drag the cursor over a block of text
- double-click a word to select it
- click a paragraph to select it
- triple-click a paragraph to select it and all of the content within it
- choose Edit > Select All to select all content.

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Changing margins

To change the margins for all the content:

1 Choose Format > Format Margins.

2 Update the Format Margins form.

Shortcut
Drag the bars at the ends of the ruler to the desired locations.

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Formatting paragraphs

For a selected paragraph, you can change:

- alignment
- interline and interparagraph spacing
- indentation
- tab stops.

You can also make these changes your default paragraph style.

Changing paragraph alignment

You can align a paragraph with the left margin, the right margin, or the center of the body.

To align a selected paragraph, use one of these methods:

- choose Format > Align, then the alignment you want
- choose the alignment you want from the edit bar
- choose Format > Format Paragraphs, then choose your alignment option at "Alignment".

Changing paragraph spacing

You can change both the interline spacing for a paragraph and the amount of space above a paragraph.

To change a selected paragraph's spacing:

1 Choose Format > Format Paragraphs.

2 Enter your spacing requirements at "Space above" and "Line space".

As a guideline to how many pixels to specify for space above a paragraph, this paragraph has 6 pixels above it.

Indenting paragraphs

You can change the indentation of a paragraph from the left and right margins. In addition, you can set a separate indentation value for the first line of the paragraph.

To indent or outdent a selected paragraph, use one of these methods:

- choose Format > Increase Indent to indent to the next tab stop, or Format > Decrease Indent to outdent to the previous tab stop

  This affects left indentation only.

  Shortcut
  Triple-click the paragraph, then press Tab to indent or Shift-Tab to outdent.
- drag both top and bottom triangles at the end of the ruler

  Depending on the end of the ruler you work with, this affects left or right indentation of the whole paragraph. To change the first line indentation, drag just the top left triangle.
- choose Format > Format Paragraphs, then specify the indentation you want at "Left side", "First line", and "Right side".

  To indent or outdent one tab stop at a time, click the arrow buttons.

Working with tabs

You can either use the default tab stops that are indicated on the ruler or specify your own tab stops. To move to the next tab stop, press Tab.

All tabs are left-aligned. Tab stop positions are calculated from the left margin.

Adding tab stops

To add a tab stop for a selected paragraph:

1 Choose Format > Format Paragraphs.

2 Enter the location for the tab stop at "New tab".

3 Click Add to List.

The new tab stop location appears at "Tab list". Any default tab stops to the left of this tab stop are deleted.

Shortcut
Click the desired location on the ruler. To change the location of this tab stop, drag it along the ruler.

Deleting tab stops

To delete a tab stop for a selected paragraph:

1 Choose Format > Format Paragraphs.

2 Select the tab stop at "Tab list".

3 Click Clear Selected.

Any default tab stops to the left of the deleted tab stop are restored.

Shortcut
Drag the tab stop down off the ruler.

Changing default tab stops

To change the spacing between default tab stops for a selected paragraph:

1 Choose Format > Format Paragraphs.

2 Enter the tab stop spacing, in pixels, at "Default".

Shortcut
Drag one of the default tab stops along the ruler. All default tab stops move with the one you are dragging.

Creating a default paragraph style

You can specify the formatting that you want to use as a default paragraph style. To do this:

1 Select a paragraph.

2 Choose Format > Format Paragraphs.

3 Update the Format Paragraphs form.

4 Click Save as Default.

To apply these defaults to a paragraph, click Use Default on the Format Paragraphs form.

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Formatting text

For selected text, you can:

- apply styles such as bold and italics
- change the font
- change the size
- change the color.

You can also make these changes your default text style.

Changing text style

You can apply styles such as bold, italics, underlined, and superscript to text. These styles can be applied in combination.

To apply styles to selected text, use one of the following methods:

- choose Format > Style, then the styles you want
- click the appropriate button on the edit bar

  Plain removes any special styles.
- choose Format > Format Text, then select the styles you want.

  "Placement" allows you to apply superscript or subscript formatting.

Changing fonts

To change the font of selected text, use one of these methods:

- choose Format > Font, then the font you want

- choose the font from the edit bar
- choose Format > Format Text, then choose the font at "Font".

Changing text size

To change the size of selected text, use one of these methods:

- choose Format > Size, then the size you want

  The value Smaller makes the size one point smaller. The value Larger makes it one point larger.
- choose or type the size from the edit bar
- choose Format > Format Text, then enter the size at "Size".

Changing text color

To change the color of selected text, use one of these methods:

- choose Format > Color, then the color you want

  To see more colors or create custom colors, choose Other Color.
- choose the color from the edit bar
- choose Format > Format Text, then choose the color at "Color".

Creating a default text style

You can specify the formatting that you want to use as a default text style. To do this:

1 Select some text.

2 Choose Format > Format Text.

3 Update the Format Text form.

4 Click Save as Default.

To apply these defaults to other text, click Use Default on the Format Text form.

Note
You can also change default text formatting (font, size, and color) at "Normal text" in your content edit preferences.

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Formatting horizontal lines

You can change the appearance of a horizontal line by specifying:

- the line thickness
- the space above the line
- the width of the line
- the color of the line
- whether the line is visible.

To change the appearance of a horizontal line:

1 Select the line.

2 Choose Format > Format Horizontal Line.

3 Update the Format Horizontal Line form.

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[Hiding embedded pictures]
[Opening pictures in the viewer window]
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[Embedding pictures]

About embedded pictures

An object can contain picture files that are embedded directly in the content. If FirstClass supports the file type of an embedded file, the file contents are displayed; otherwise, a placeholder is displayed.

Note
You can also embed other types of files, such as text files and recordings. As is the case for pictures, FirstClass will indicate these files with a placeholder if it cannot display their contents.

To see a description of an embedded picture (if one was supplied), display the picture or placeholder's tooltip.

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Hiding embedded pictures

When FirstClass is first installed, embedded pictures are shown by default. If you want to speed up the time it takes to open objects containing pictures, you can hide these pictures by default. When you hide pictures, they are indicated by placeholders.

To hide embedded pictures, clear "Always show images" in your content view preferences.

Showing hidden pictures

To show all hidden embedded pictures in an object, choose View > Show Images with the object open.

To show a specific embedded picture, or any other embedded file that FirstClass is not able to display, open the shortcut menu from the placeholder, then choose Open. If FirstClass does not support the format of the file, it tries to open the file using the application associated with it on your computer. For example, a .cdr file is opened in CorelDRAW®, if you have this application.

Note
The next time you open this object, the pictures are hidden again.

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Opening pictures in the viewer window

FirstClass lets you open an embedded picture in a separate viewer window. To do this, double-click the picture.

Note
If you double-click a placeholder, and the embedded file can be viewed by another application on your computer, the file is automatically opened in that application. If you double-click an embedded picture in an object that you can edit, the Format Image form opens. To open the viewer window, click Open.

In the viewer window, you can control how the file is displayed, and print and save the file. If there is room, the picture is displayed at its original size.

To rotate the display, choose View > Image > Rotate Left or Rotate Right.

To resize the display, choose View > Image, then the appropriate menu command. You can also click Use Zoom Tool, then click the display to enlarge it. To make this display smaller again, Control-click (Windows, Linux) or Option-click (Mac OS, Mac OS X) while the Use Zoom Tool control is still active.

Shortcut
Resizing the viewer window makes the display grow or shrink to fit, if Image > Fit to Window is selected.

To pan a display that is larger than the viewer window, click Use Hand Grab Tool, then drag the display to see the parts that are hidden.

To select an area of the display for copying to the clipboard, click Use Select Tool, then click and drag over the area, starting at the top left corner of the area you want to select. Release the cursor when you are at the bottom right corner of the area. A selection marquee is displayed around the area. To select the whole picture, choose Edit > Select All.

To print the file, choose File > Print or click the Print toolbar button. If you chose File > Print, the Print Layout form opens, allowing you to specify how you want to print the file.

Note
Any changes that you make on the Print Layout form are not saved as defaults when you open this form using File > Print.

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Saving embedded picture files

To save an embedded picture file to your computer:

1 Click the picture.

2 Choose File > Save Attachment.

3 Select the folder where you want to save the file.

The file is saved in the format in which it was embedded.

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Embedding pictures

To embed a picture into your content, use one of the following methods:

- drag the picture or a picture file to the body
- copy the picture to the clipboard, then choose Edit > Paste or Paste Special
- click the location in the body where you want the picture to appear, then choose Edit > Insert > Insert File.

How pictures are embedded

The file format of an embedded picture depends on how you embedded the picture.

If you chose Insert Image, the picture file format is the same format as the original.

If you dragged the picture to the message body, the picture file format is the same format as the original.

If you chose Paste, the picture file format is the best format as determined by FirstClass (for example, screen shots paste as .png, and photographs paste as .jpg).

If you chose Paste Special, the picture file format is the format that you chose when you pasted the picture. In the case of .jpg files, the file resolution and size depend on the "JPEG quality" value you chose on the Paste Special form.

Changing picture properties

You can change the following properties of an embedded picture:

- the width of the blank space (padding) around the picture

  If the picture is in a paragraph by itself, you can also adjust the spacing above it by changing the paragraph spacing.
- the picture alignment (right, left, or aligned within the text so that the picture flows along the line with the text)
- the picture size
- text that describes the picture.

To change picture properties:

1 Select the picture by clicking it.

2 Choose Format > Format Image.

Shortcut
Double-click the picture.

3 Update the Format Image form.

Note
You can also change the properties of a placeholder for an unsupported file type. Choose Format > Format Embedded File to open the Format Embedded File form (which is identical to the Format Image form).

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About tables

Tables let you put content in rows and columns of cells. If you have used tables in other applications, you'll be familiar with how FirstClass tables work.

A table cell can contain not only text, but all normal content elements, such as embedded pictures, multiple paragraphs, tabs, and even another embedded table.

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Creating tables

To create a table:

1 Click where you want to insert the table.

2 Choose Edit > Table > Insert Table.

3 Update the New Table form.

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Selecting table elements

To select a row, position the cursor to the left of the row. Click when the cursor looks like this:
➡

To select a column, position the cursor above the column. Click when the cursor looks like this:
⬇

To select a cell, position the cursor in the blank space around the cell content. Click when the cursor looks like this:

You can select content in table cells just as you do content elsewhere.

Notes
Clicking in a cell makes that cell, and that table, the active cell and table. Formatting commands work on the active cell and table, just as if they were selected.

You can also use the arrow keys to move from cell to cell.

Extending selections

To select additional rows or columns, Shift-click them.

If a cell is selected, you can select the next cell in the row or column by pressing Shift plus the appropriate arrow key. You can also click the top left cell of the area you want to select, then drag the cursor and release it at the bottom right cell.

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Formatting tables

To change the formatting of a whole table:

1 Click anywhere in the table.

2 Choose Format > Format Table.

3 Update the Format Table form.

Adding rows

To add a row to a table:

1 Click the row below where you want to insert the new row.

Tip
To insert more than one row, select the number of rows that corresponds to the number of rows you want to add. The new rows will be placed above the selected rows.

2 Choose Edit > Table > Insert Rows.

Making a header row

To make the first row of a table act as column headings which repeat at the top of each page in page width mode, in a presentation, or when printed, choose "First row is header" on the Format Table form.

Adding columns

To add a column to a table:

1 Click the column to the right of where you want to insert the new column.

Tip
To insert more than one column, select the number of columns that corresponds to the number of columns you want to add. The new columns will be placed to the left of the selected columns.

2 Choose Edit > Table > Insert Columns.

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Formatting selected cells

To change the formatting of selected cells:

1 Choose Format > Format Cells.

2 Update the Format Cells form.

Shortcut
To change the width of any column except the last one, position the cursor over the right border of the column. Drag the column border when the cursor looks like this:

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Moving rows and columns

To move a row or column:

1 Select the row or column.

2 Choose Edit > Cut.

3 Click the row below where you want the row inserted, or the column to the right of where you want the column inserted.

4 Choose Edit > Paste.

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Deleting rows and columns

To delete a selected row, choose Edit > Table > Delete Rows.

To delete a selected column, choose Edit > Table > Delete Columns.

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Merging cells

You can merge two or more selected cells in a row or in a column. The borders between merged cells are removed, and the cells are combined so that there is just one content area that spans all merged cells.

To merge selected cells so that you create one column out of all selected columns, choose Edit > Table > Merge Columns.

To merge selected cells so that you create one row out of all selected rows, choose Edit > Table > Merge Rows.

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Splitting merged cells

To split a selected merged cell so that you create the original number of columns, choose Edit > Table > Split Columns.

To split a selected merged cell so that you create the original number of rows, choose Edit > Table > Split Rows.

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Copying and pasting tables

If you copy a table from FirstClass or an external application, it will automatically paste into FirstClass content as a table.

Note
You can copy a FirstClass table and paste it into a rich text (RTF) file in another application.

How your selection affects what is copied

When you copy from a table, your selection determines what gets copied. If you just selected a single cell or content from a single cell, it is copied without the table.

If you selected multiple cells (or the whole table), those cells and their contents are copied as a table.

How your selection affects what is pasted

When you paste, your selection at the time you paste determines what happens.

If you just clicked the cursor where you wanted to paste, the copied material is pasted there. If the copied material is a table, it is pasted as a new table. This even happens if you click within the cell of an existing table. The result is a table embedded within the existing table.

If you selected an entire table (or tables), the copied material replaces it.

If you selected multiple cells in an existing table, and your copied material is a table, the contents of the existing cells are replaced with the contents of the copied cells. You can use this method to replace, for example, the contents of a row in one table with the contents of a row from another table.

If your copied material isn't a table, it is pasted into the first selected cell, and the contents of the other selected cells are deleted.

Pasting delimited text as a table

You can also paste tab- or comma-delimited text as a FirstClass table. To do this:

1. Click where you want to paste the table.
2. Choose Edit > Paste Special.
3. Select the format you want for the text in the table.
4. Select "Paste as table".

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About links in content

Within the content of an object, you can add links to another FirstClass object, another location in the current object, or a web page. There are two types of links that you can add:

- URL links

  These links provide shortcuts to objects on your own server, to objects on other FirstClass servers, or to web pages. You type the URL for the object to which the link connects (the target object) directly in the content.
- embedded links.

  These links provide shortcuts to objects on your own or other FirstClass servers. You create these links using the Edit menu. You can make the link text anything you want, or even use embedded pictures as links, unlike URL links. You can also embed markers in content and link to those markers.

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Creating URL links to web pages

To create a URL link to a web page, type the URL in the appropriate format.

For example, to link to FirstClass' web page, you would type
`www.firstclass.com`
or
`http://www.firstclass.com`

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Creating URL links to servers

To include a URL link to a FirstClass object, such as a conference, in a message or document, type the link in the following format:
`fcp://`*`server name`*`/`*`object name`*

For example, to link to a Budgets conference on the HuskyPlanes server, you would type
`fcp://fc.huskyplanes.com/budgets`

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How URL links behave in messages

In a message, a URL link is formatted according to the recipient's preferences for how links appear in messages. Formatting does not take place until the message is sent.

The following is an example of a formatted URL link:
www.firstclass.com

To activate a link before a message is sent (or any time the message is editable), click the link, then choose File > Open > Open Link.

To activate a link in a sent, uneditable message, click the link.

If you are linking to another server, the FirstClass Login form for that server opens.

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How URL links behave in documents

In a document, the cursor changes to a hand when it is over a URL link.

To activate a link while the document is editable, click the link, then choose File > Open > Open Link.

To activate a link in a document that you cannot edit, click the link.

If you are linking to another server, the FirstClass Login form for that server opens.

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Embedding markers

A marker can be embedded at any location in the content of a FirstClass object, and acts as a target for embedded links. Without a marker, a link to another object opens that object at the top. When the link points to a marker, the target object opens at the line containing the marker. You can also use markers to jump from one place to another within the same object.

Markers appear as icons that only authors can see; they are hidden from users who cannot edit the object.

You can embed a marker in two ways:

- insert it and then give it a name
- insert it before selected text that is used to name it.

To embed a marker and then name it

1 Click where you want to embed the marker.

This can be anywhere on a line.

2 Choose Edit > Insert > Insert Marker.

3 Type an identifying name for this marker at "Name".

To embed a prenamed marker

1 Select the text that you want to use as the marker name, at the location where you want the marker.

2 Choose Edit > Make Marker.

The marker is inserted before the selected text. This text is used as the default marker name.

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Working with markers

You can do the following with markers:

- rename them
- list all markers that are in an object, and work with the markers from this list
- move them

  To move a marker to another location in this object, drag it.
- delete them.

  To delete a marker, select it, then choose Edit > Clear.

Renaming markers

To rename a marker:

1 Select the marker, then choose Format > Format Marker.

Shortcut
Double-click the marker.

2 Type the new name.

Listing markers

To list all markers in your message, choose Edit > List Markers. The list shows the names of your markers.

From the Marker List, you can select a marker, then:

- select the marker in your message - click Show
- rename the marker - click Rename.

When you are finished with this list, click Close.

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Embedding links

An embedded link is a block of selected text or an embedded picture that readers can click to jump to the link target. Link text is formatted according to readers' content view preferences.

Links include icons that only authors can see; the icons are hidden from users who cannot edit the object.

To embed a link into your content, use one of the following methods:

- drag a FirstClass object
- paste copied FirstClass content as a link
- drag a marker
- drag a web site address
- create a link directly.

Dragging FirstClass objects into content

To embed a link to another FirstClass object by dragging:

1 Display the target object unopened.

2 Drag the target to the desired location in your content.

A link icon is displayed, with the name of the target inserted as the link text.

3 Replace the link text with text of your choice, if desired.

Pasting copied FirstClass content as links

To embed a link to another FirstClass object by pasting:

1 Open the target object.
2 Copy any content from the object.
3 Choose Edit > Paste Special at the desired location in your content.
4 Choose Link (URL).

   A link icon is displayed, with placeholder link text.
5 Replace the link text with text of your choice.

Dragging markers into content

To embed a link that leads to a marker:

1 Shift-drag the marker to the desired location in your content.

   You can drag markers from other objects, or from within the object you are working on.

   A link icon is displayed, with placeholder link text.
2 Replace the link text with text of your choice.

Dragging web site addresses into content

To embed a link to a web site:

1 Display the target web page.
2 Drag the URL icon from the address bar in your web browser to the desired location in your content.

   A link icon is displayed, with the name of the target inserted as the link text.
3 Replace the link text with text of your choice, if desired.

Creating links directly

You can create a link in two ways:

- insert it and then type link text
- insert it before selected text that becomes the link text.

To create a link and then type link text

1 Click where you want to embed the link.

   This can be anywhere on a line.
2 Choose Edit > Insert > Insert Link.
3 Update the Format Link form.

   If you want to link to a marker, you can leave "Target URL" blank and click OK, then drag the marker to the link icon. You can then reopen the form and update it if required.

To create a link with selected link text

1 Select the text (or embedded picture) that you want to use as a link.
2 Choose Edit > Make Link.

   The link is inserted before the selected text.

   Note
   Make Link is a toggle command.
3 Update the Format Link form.

Testing links

To test a link, use one of the following methods:

- select the link icon, or click the link text or picture, then choose File > Open > Open Link
- Control-click (Windows, Linux) or Option-click (Mac OS, Mac OS X) the link
- double-click the link icon, then click Test.

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Working with links

You can do the following with links:

- change their properties, including what they link to
- list all links that are in an object, and work with the links from this list
- delete them.

  To delete a link, select the link icon, then choose Edit > Clear. Special formatting is removed from the link text.

Changing link properties

You can change the following properties for a link:

- the target to which the link connects
- the link text
- the window in which the link opens.

To change properties for a link:

1. Select the link icon, then choose Format > Format Link.

   Shortcut
   Double-click the link icon.

2. Update the Format Link form.

Listing links

To list all links in your object, choose Edit > List Links. The list shows the link text for all your links.

From the Link List form, you can select a link, then:

- select the link in your message - click Show
- open the target - click Open
- change link properties - click Edit.

When you are finished with this list, click Close.

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If links don't work for other users

If other users can't follow your links:

- your administrator may not have given them access to the container
- they may not have permission to open objects in the container
- FirstClass may not be able to find the target object (for example, when a message containing a link is mailed to someone who isn't on your server).

If FirstClass can't find the target, and the target hasn't been deleted or moved since the link was made, the link may be relative instead of absolute.

About relative links

A relative link can be used between objects that will always be located in the same places in relation to each other. An example is a self-contained set of documents, like the help you are reading. The whole set can be moved (as it is in the case of this help, which moves to your own server), and links among the documents will still work.

A relative link consists of only a relative path. It doesn't include any server identification. If the target object is in a different subcontainer from the object containing the link, the path starts with the container that is common to both (../ indicates that the path is starting at the container above the current container, ../../ indicates that the path is starting two containers above the current container, and so on).

By default, FirstClass creates relative links in documents, as long as there is a common container for the documents somewhere in their paths.

About absolute links

An absolute link is necessary if the object containing the link may be moved in relation to the target object. To ensure that the link still works, the full path, including server identification (a protocol specifier, such as fcp, and a server address) is provided.

By default, FirstClass creates absolute links in messages, and in documents that don't share a common container in their paths.

Changing link types

If you copy a relative link, FirstClass converts it to an absolute link on the clipboard (because it could be pasted anywhere). If you paste this link back into a FirstClass object, it is converted back to a relative link, as long as the conditions required for a relative link are met.

You can also manually change a link from relative to absolute, or vice versa. To do this, change the link path at "Target URL" on the Format Link form. For example, the relative path
`../budget/report`
could be turned into the absolute path
`fcp://fc.huskyplanes.com/finance/budget/report`

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[Embedding recordings](#)
[Playing embedded recordings](#)

Embedding recordings

You can embed recordings (.wav, AIFF, or MP3 files) in content, and users can play these recordings directly from the embedded files.

To embed a recording, drag the file into your content just as you would a picture file:

Formatting recording placeholders

You can format the placeholder for an embedded recording just as you can an embedded picture. To open the Format Sound Clip form, choose Format > Format Sound Clip.

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Playing embedded recordings

To play an embedded recording in editable content, choose Play from the shortcut menu. To stop playback, choose Stop from the shortcut menu.

To play the recording in uneditable content (for example, a sent message), click

To stop playback, click

To open the recording in a separate voice player window, double-click it. You can adjust the volume from this window.

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Messages

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Getting information about senders and recipients
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Getting information about senders and recipients

If the sender of a message is known to FirstClass, you can view information about this person. To do this, select the sender's name in the header, then choose Open User Info Form from the shortcut menu. You can view information about other recipients of this message, or see who belongs to a mail list, in the same way.

If you receive Internet mail from people who are in your Contacts folder, you can open the personal addresses for these people by double-clicking their names.

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Listening to voice messages

A voice message is received as a FirstClass message with a .wav file attachment. The first time you open the message, the attachment will play automatically.

To replay the message, click Play on the recorder panel.

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Reading fax messages

To open a fax message, click it. The fax pages will be attached to the message.

If you have set your preferences to receive each page as a separate file (PCX), there will be one attachment per page.

If you have set your preferences to receive the entire fax as one file (DCX), there will be one attachment.

To view a fax page, download the attachment.

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Viewing Internet headers

An Internet header describes the route taken by a message received over the Internet. To see this header, choose View > Show Internet Header. The header is displayed above the message body.

To hide the header, choose this menu command again.

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Opening messages sequentially

To open the next message in a list of messages, choose Collaborate > Navigation > Next Item.

To open the previous message, choose Collaborate > Navigation > Previous Item.

Reminder
In Explore view, you can open first unread messages, then read messages, starting with the oldest, by pressing the space bar.

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Selecting what to list

If you are interested in checking only one type of mail, such as unread messages, in a container, you can list only those messages. Your changes are only in effect for as long as you have the container open.

To list only a certain type of mail:

1 Open the container.

2 Choose View > Filter, then one of the following:
   - Show Incoming Items - lists only received messages
   - Show Outgoing Items - lists only sent messages
   - Show Unsent Items - lists only unsent messages
   - Show Unread Items - lists only messages that you haven't read
   - Show All Items - reverts to the default view, which is all message types.

Listing only unread messages by default

You can list only unread messages by default in all containers. This can cut down the time it takes to see the list of messages when you have a slow connection.

To list only unread messages by default, select "Show only unread items" in your viewing preferences.

When you list only unread messages by default:

- the number of read messages not displayed is indicated on the summary bar (where they are referred to as hidden messages)
- only read messages will be hidden; you will still see other types of messages, such as unsent and sent messages in your Mailbox.

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Working with unread messages

Opening only unread messages

To open the next unread message in a list of messages, choose Collaborate > Navigation > Next Unread.

To open the previous unread message, choose Collaborate > Navigation > Previous Unread.

Turning unread flags off and on

When a message is unread, a red flag is displayed beside it. You will also see a red flag beside the icon for your Mailbox or a conference that contains unread messages.

After you open an unread message, the red flag beside the message disappears. If you want this message to attract your attention again, you can put the flag back. To do this, choose Message > Mark as Unread with the message selected. To remove the flag again, choose Message > Mark as Read.

Shortcut
Control-click (Windows, Linux) or Option-click (Mac OS, Mac OS X) beside the message in the flag column.

If you select a block of mixed read and unread messages, then choose Message > Mark as Read, only the unread messages are affected; their flags are removed.

Removing all unread flags

To remove all unread flags in a container, select the container's icon, then choose Message > Mark as Read.

Shortcut
Control-click (Windows, Linux) or Option-click (Mac OS, Mac OS X) the flag beside the icon.

If you choose Message > Mark as Unread while this icon is still selected, all messages in a conference, or all messages sent to you in your Mailbox, are marked as unread, not just the ones that were originally unread.

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Working with message threads

Messages with the same subject, that were sent in reply to other messages, are presented in a special way. As replies to messages accumulate, they create a thread. Each reply in the thread is numbered; by default, the subject of the first reply starts with "Re:", the subject of the reply to this reply starts with "Re(2):", and so on. When you group messages by subject in List view, all older messages in a thread are grouped under the most recent message.

Following message threads

If you open or select a message that is part of a thread, you can open the next message in the thread by choosing Collaborate > Navigation > Next in Thread.

To open the previous message in this thread, choose Collaborate > Navigation > Previous in Thread.

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Changing message expiry dates

Normally, messages expire after a certain number of days, and are then deleted by FirstClass. You may be able to change a message's expiry date so that it will expire much later, or never expire.

To change the expiry date of a message, open its properties, then choose the expiry period at "Expiry period".

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Dealing with Called, No message notifications

If someone phones but doesn’t leave a message, you will see a Called, No message notification listing the caller's phone number and location.

If you do not want to receive these notifications for all or some callers, change your voice messaging preferences.

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Dealing with junk mail

FirstClass can mark as junk certain types of mail on the assumption that they are unsolicited (also known as spam). You can decide whether to accept or reject this mail. For details on what FirstClass considers junk, contact your administrator.

Note
Your administrator may have defined other types of mail as junk, such as mail coming from a particular address. You will never see this mail.

To specify how you want to handle the mail that FirstClass considers junk, choose the option you want at "Junk mail handling" in your mail rules preferences.

In addition, you can define what you consider to be junk mail (for example, mail from a particular address) and create rules that tell FirstClass what to do with this mail.

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Retrieving mail from Internet mail accounts

You can import mail from POP3 mail accounts into your FirstClass account, so that mail from all accounts appears in your FirstClass Mailbox. To do this:

1 Click Import Accounts in your mail rules preferences.

2 Update the Mail Import form.

You can choose different icons for each account, to make it clear which account a message came from.

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[About notification]
[Activating notification]
[What you can do from the notification popup]

About notification

FirstClass includes a mail notification feature that lets you know you have received mail in either of the following situations:

- you are not connected to a server
- you are not currently working with the FirstClass client.

For notification to work:

- you must use a TCP/IP- or UDP/IP-compatible network where your server uses UDP port 810

  If you are unsure whether this is the case, check with your administrator.
- you are currently connected to this network
- notification has been activated
- the settings files for which you want notification to work are all in FirstClass' Settings folder
- the FirstClass client is currently running.

FirstClass lets you know you have new mail in one of these ways:

- it opens a notification popup, if you are currently working with the FirstClass client, but are not connected to the server that received the mail
- it animates the FirstClass icon, if you are not currently working with the FirstClass client (Windows)
- it uses your operating system's standard notification manager, if you are not currently working with the FirstClass client (Mac OS, Mac OS X).

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Activating notification

You activate notification in your settings file. If you use multiple settings files, you can activate notification in some settings files but not in others. This lets you customize notification behavior so that, for example, you are notified about new mail on one server, but not another, or about new mail to one of your user IDs, but not another.

To activate notification:

1 Choose Collaborate > Connect.

2 Make sure the settings file for which you want notification active is displayed at "Address".

3 Click Setup.

4 Select "Notify me of new mail when offline".

5 Type your password for this connection at "Notifier password", if it is not saved in this settings file.

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What you can do from the notification popup

The notification popup provides a description of a new message, unless either the FirstClass client or the server have just been restarted. The popup also contains the following buttons:

<
Displays a description of the previous new message.

>
Displays a description of the next new message.

Cancel
Closes the notification popup.

Login
Opens the FirstClass Login form, so that you can connect to the server that received the mail.

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What happens when you create a message
Message forms
Creating messages

What happens when you create a message

When you send a message to several people, only one copy of the message is actually created. It is stored on the server, and links to it are stored in your Mailbox and the Mailboxes of all recipients.

You can change the properties of your own link, or even delete it, without affecting the links in others' Mailboxes. The actual message stays on the server as long as there are any links to it, and it has not expired.

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Message forms

FirstClass includes a standard message form and special forms that you can use to create new messages. The icon associated with a message reflects the message form used to create the message.

You can preview the message forms simply by opening them as if you were going to use them to create messages. If you do not want to create a message using an open form, choose File > Delete.

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Creating messages

To open a copy of the standard message form, choose Message > New Message.

To open a copy of a special message form, choose Message > New Message Special, then the appropriate form.

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[About stationery](#)
[Using stationery](#)
[About personal stationery](#)
[Creating personal stationery](#)
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About stationery

Your administrator may create partially completed message forms as stationery. These message forms often contain information such as the address to which a message will be sent. Depending on how your administrator set up stationery, you may not be able to change prefilled information.

Stationery appears in the top pane. It works just like a paper pad of message forms; you "tear one off" and fill it in.

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Using stationery

To use stationery:

1. Double-click the stationery to open a copy of the message form.
2. Fill in the missing information.
3. Send the message as you would any other message.

Top

About personal stationery

You can create personal stationery that works like the stationery created by your administrator. If you send a lot of messages with common information, such as messages addressed to the same person or conference, or on the same subject, you will find personal stationery a convenient shortcut when creating these messages.

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Creating personal stationery

To create personal stationery:

1. Open your Mailbox.
2. Create a new message, using whichever message form you want, and fill in any fields you want prefilled.
3. Close the message without sending it.
4. Open the message's properties, then select "Stationery".

The message is converted to stationery and placed in the top pane of your Mailbox.

Tip
If you want other users to use your stationery, move it to another container where your intended stationery users have access.

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Changing personal stationery

To change personal stationery:

1 Open the stationery's properties, then clear "Stationery".

The stationery becomes an unsent message in the bottom pane.

2 Open the unsent message and change information as required.

3 Close the message without sending it.

4 Open the message's properties, then select "Stationery" again.

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Related topics
About contact management

Addressing messages using the Directory
Addressing messages to conferences
Addressing messages to Internet addresses
Addressing messages to gateway addresses
Using addresses from other messages
Using addresses from external sources
Removing recipients

Addressing messages using the Directory

To specify a recipient who is in the Directory, enter the recipient's full name or part of the name. For details, see the help for the standard message form.

To create a message from the Directory

If you have not yet created a new message, you can use the Directory or Who's Online list to create a preaddressed standard message. To do this, open the shortcut menu from the listed recipient, then choose Create Mail To.

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Addressing messages to conferences

You can address a message to a conference just as you would to another user. To automatically address a message to a conference, open the conference, then create the message.

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Addressing messages to Internet addresses

To specify a recipient when the message will go over the Internet, type the recipient's email address (for example, `amanda_ho@huskyplanes.com`). FirstClass recognizes any address containing @ as an Internet address.

FirstClass does not check whether this type of address is valid.

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Addressing messages to gateway addresses

To specify a recipient who is connected to your server through a gateway, type the address in the format
recipient's name,gateway name

The recipient's name is the user name or address of the recipient as defined on the other system. The gateway name is the name used by the other system.

Example
To send a message to Amanda Ho through the HuskyPlanes Toronto gateway, type
`Amanda Ho,HuskyPlanes Toronto`

For information on the gateways to which you can address messages, contact your administrator.

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Using addresses from other messages

To use an address from an existing message or document, drag it to the appropriate field of your new message. You can also open the shortcut menu from the address, then choose Create Mail To, to create a preaddressed new message.

To use a mailto link in the body of a message or document, click the link. A new message is created with this address in the "To" field.

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Using addresses from external sources

To use an address from an external source, select the address, then Control-drag (Windows, Linux) or drag (Mac OS, Mac OS X) it to the appropriate field in your new message.

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Removing recipients

To remove a recipient from your message, select the recipient, choose Edit > Clear, then press Tab to completely clear the line.

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About signatures
Creating signatures
Adding signatures to selected messages

About signatures

When you create a new message, you can add a signature to the bottom of the message body. Signatures can be used to repeat your name, indicate your title or email address, or even cite a favorite quote.

You can add your signature only to selected messages, or make FirstClass add it automatically to all new messages.

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Creating signatures

To create your signature text, update your signature preferences. This is where you can make FirstClass add your signature to all new messages.

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Adding signatures to selected messages

If your preferences do not tell FirstClass to automatically add your signature to all new messages, you can add it to a specific message by choosing Edit > Insert > Insert Signature with the message open.

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[Making messages low priority]
[Requesting notification of message receipt]
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[Setting message sensitivity]
[Sending messages]
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[Mailing files using a MAPI-enabled application]

Making messages urgent

An urgent message appears in bold. Where applicable, it also invokes special gateway handling.

To make a message urgent, choose Message > Priority > Priority Urgent with the message open.

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Making messages low priority

Some gateways have special handling for low (bulk) priority mail. Check with your administrator to see if making messages low priority is useful to you.

To make a message low priority, choose Message > Priority > Priority Bulk with the message open.

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Requesting notification of message receipt

When you send someone a private message, you can make FirstClass send notifications of the message status to your Mailbox. The message is marked as Registered.

To be notified when the recipient reads your message, choose Message > Receipt > Receipt on Read with the message open.

To be notified when your message is delivered to the recipient's Mailbox, choose Message > Receipt > Receipt on Delivery with the message open. This option is useful when the recipient is using FirstClass on another server; it will not work on most other mail systems.

To be notified each time your message is delivered to another server on its route, choose Message > Receipt > Receipt on Route with the message open. This option is useful for detecting problems in multiserver FirstClass mail systems; it will not work on most other mail systems.

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Preventing generation of nondelivery notices

By default, FirstClass sends a nondelivery notice (NDN) to your Mailbox when your message cannot be delivered.

If you do not want to receive an NDN for a particular message, choose Message > Receipt > Suppress NDN with the message open.

Top

Setting message sensitivity

Currently, message sensitivity has no effect on how FirstClass handles messages. It is provided as information for the recipient, and could be used by third-party gateways.

By default, messages are assigned normal sensitivity. To change sensitivity, choose Message > Sensitivity, then one of the following:

- Sensitivity Personal
- Sensitivity Private
- Sensitivity Company.

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Sending messages

To send your message but leave it open, choose Message > Send.

To send your message and close it, choose Message > Send and Close.

After you send a message, FirstClass adds a postmark icon to the message header.

Sending messages later

To close a message and leave it unsent, just close the message window. The message stays in your Mailbox with an unsent flag beside it.

You can open the message later to update and then send it, or simply select and send it.

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Unsending messages

In certain circumstances, you can unsend a message. This makes the message disappear from the Mailbox or conference to which you sent it.

Note
Be aware that the message may have already been read.

You cannot unsend a message that was:

- sent through the Internet or a gateway
- moved into a folder or deleted by the recipient
- sent to a user who does not allow you to unsend from her Mailbox.

To unsend a selected or open message, choose Message > Unsend. An unsent flag is displayed beside the message in your Mailbox.

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Checking whether messages have been read

FirstClass tracks the history of each message. This history includes when it was created, who has read it and when, and whether it was worked with in any other way (for example, forwarded or copied).

To see the history of a message, select or open the message, then choose Message > History.

In the history window, you can double-click a user's name to see the résumé for that user. If you double-click a gateway (a "Routed to" entry), you will see information about that gateway.

Note
The names of Bcc recipients do not appear in the history, except to themselves and to the message sender.

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Mailing files using a MAPI-enabled application

If you have set FirstClass as your default mail client in your general preferences, you can create files in a MAPI-enabled application such as Microsoft® Word, then mail them using FirstClass.

To mail a file from a MAPI-enabled application, choose the application's Send command (often under the File menu) with the file open. FirstClass creates an unsent message with the file attached. If you are not currently connected to a FirstClass server, you will be prompted to log in before you see this message.

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Replying to messages

You can send a message reply to:

- the message sender plus all other recipients of the message
- just the sender
- just the conference that contains the message, if the message is in a conference.

If you simply reply to a message without specifying recipients, the reply is sent to your default reply recipients, or, in the case of a message in a conference, to the conference's default reply recipients.

No matter how you decide to direct your reply, you can update the reply recipients just as you would address any other message.

A message reply is given a subject of "Re:" plus the subject of the original message.

Replying to voice messages

You can reply to any voice message from a FirstClass Unified Communications user who called from an identified FirstClass Unified Communications number.

If you want to include the original message with the reply, forward the message instead of replying to it, and add your comments to the forwarded message.

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Specifying default reply recipients

You can specify who will receive your replies to messages by default. This default only affects your private mail, not messages in conferences. Conferences have their own default reply recipients.

To specify the default recipients for your replies, choose your default recipients at "Reply preference" in your mail rules preferences.

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Replying to your default recipients

To reply to your default recipients:

1 Select or open the message to which you want to reply.

2 Choose Message > Reply.

3 Type and send your reply as you would any message.

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Replying to everyone

To reply to the sender and the original recipients of a message, choose Message > Reply Special > Reply All with the message selected or open.

The sender's name is placed in the "To" field of the reply. The names of the original recipients are placed in the "Cc" field.

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Replying to senders only

To reply to just the sender of a message, choose Message > Reply Special > Reply Sender with the message selected or open.

To reply to just the original sender of a forwarded message, choose Message > Reply Special > Reply Original Author with the message selected or open.

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Replying to conferences only

To reply to just the conference that contains a message, choose Message > Reply Special > Reply Conference with the message selected or open.

Top

Quoting original messages

You can quote all or part of a message when you reply to it. A quote is prefaced by the name of the original sender and the time the original message was sent.

Quoting part of a message

To partially quote a message in your reply:

1 Open the message to which you want to reply.

2 Select the text you want to quote.

3 Choose Message > Reply.

4 Prepare and send the reply as usual.

You can type your reply above, below, or interspersed within the quoted text.

Quoting the whole message

To quote all of a message in your reply:

1 Open the message to which you want to reply.

2 Choose Message > Reply Special > Reply with Quote.

3 Prepare and send the reply as usual.

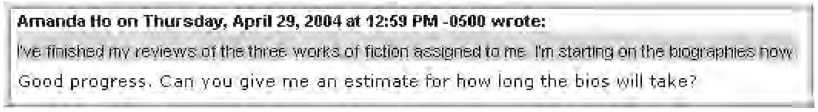
You can type your reply above, below, or interspersed within the quoted text.

Note
If you want to direct your reply using menu commands such as Reply Sender, rather than sending it to your default reply recipients or updating the reply header, you must select the

text you want to quote. You cannot choose both Reply with Quote and a directed reply menu command.

Specifying quoted text formatting

Quoted text is normally formatted in a special way, to differentiate it from your reply text. By default, FirstClass formats quoted text as black text on a gray background, as in this example:



To change the way quoted text is formatted by default, specify the font attributes you want at "Quoted text" in your content view preferences.

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Replying automatically

You can make FirstClass reply automatically to messages that are sent to you. This is useful, for example, if you want to inform people that you are not available that day.

To turn on automatic reply, update the "Automatically reply to" fields in your mail rules preferences.

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Forwarding messages
Forwarding messages automatically
Forwarding messages to pagers

Forwarding messages

When you receive a message, you can forward this message to another user or a conference. You can forward fax and voice messages just as you would a text message. To forward a message:

1 Select or open the message.

2 Choose Message > Forward.

This creates a copy of the message, including any attachments. The "Subject" field contains "Fwd:" and the subject of the original message. Your name, and the name of the original sender, are in the "From" field. The body starts with a summary of the original message's header information.

Note
The header summary is only added if the message was open when you forwarded it.

3 Address the message.

4 Make any changes you want to the message body.

5 Send the message.

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Forwarding messages automatically

You can forward your messages to another user or a conference automatically. This is useful, for example, when you go on vacation and you want your mail answered by someone else.

To forward your messages automatically, update the "Automatically forward" fields in your mail rules preferences.

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Forwarding messages to pagers

FirstClass can notify you of new messages through your pager, if you have an email-enabled paging system. To forward new messages to your pager, update your paging preferences.

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About mail rules
Creating rules for received mail
Creating rules for sent mail
Creating advanced rules
Sorting rules
Running rules on demand
Sharing rules
Rules logs

About mail rules

Basic mail rules tell FirstClass how to handle the following mail:

- messages that you send

  Rules only affect the copies of the sent mail that are left in your Mailbox (local copies).
- messages that you receive in your Mailbox
- messages that are received by conferences.

Each set of mail rules is associated with a particular container. You can set up rules for your Mailbox and for any conferences for which you have this permission.

For each container, separate rules control mail received by the container and mail sent from the container. Received mail rules apply to all containers, and run whenever that container receives mail from anyone. Sent mail rules apply to your Mailbox, and run whenever you send mail.

You can set up multiple rules for both received and sent mail. Each rule specifies a particular type of mail, and how FirstClass is to handle that mail. For example, your Mailbox may have rules to:

- delete all mail received from a specific address (such as joespammer@bugthem.com)
- file all mail with a certain subject in a specified subfolder.

You can open rules to update them, just as you would update other FirstClass objects.

Top

Creating rules for received mail

To create a rule for mail received in a specific container:

1 Select or open the container.

2 Choose Collaborate > Rules.

The container's Rules & Resources folder opens. This folder stores all existing rules for this container.

3 Choose File > New > New Receive Rule.

4 Update the Receive Rule form.

Top

Creating rules for sent mail

To create a rule for local copies of mail that you send:

1 Select or open your Mailbox.

2 Choose Collaborate > Rules.

Your Mailbox's Rules & Resources folder opens. This folder stores all existing rules for your Mailbox.

3 Choose File > New > New Send Rule.

4 Update the Send Rule form.

Top

Creating advanced rules

If the Receive Rule and Send Rule forms do not cover the conditions or actions you want to specify, you can create an advanced mail rule. An advanced rule can apply to:

- received mail
- sent mail
- mail that you run rules on manually
- mail that users delete.

Note
Setting up a properly functioning advanced mail rule can be more complex than setting up basic receive and send rules. For that reason, we recommend that you do not create these rules unless you feel you have a good knowledge of mail rules.

To create an advanced mail rule, follow the same procedure you would for a basic receive or send rule, but choose New Advanced Rule, then update the Advanced Rule form.

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Sorting rules

FirstClass runs rules in the order they appear in the Rules & Resources folder. To change this order:

1 Choose View > Change View Properties with the Rules & Resources folder open.

2 Choose None at "Sort on" on the Sorting tab.

3 Drag rules to their new locations in the list.

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Running rules on demand

You can select mail, then run rules on that mail. This allows you to apply rules to mail that was created before the rules were in place, or to mail that would not otherwise trigger rules.

To run this container's receive rules on selected mail, choose Message > Run Receive Rules.

To run this container's advanced rules (any created with the Run Manually trigger) on selected mail, choose Message > Run Manual Rules.

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Sharing rules

You can move or copy rules among containers' Rules & Resources folders, and send rules as message attachments to other users.

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Rules logs

Every time you create or update a mail rule, or change the order of mail rules, FirstClass compiles the rules for that container. This is done to locate any errors in the rules, such as a missing folder name. The results of the compile are recorded in a rules log that FirstClass places in the container's Rules & Resources folder.

The cost is a general indicator of how much impact your rules processing will have on the server. The higher the number, the more server resources you are using. A cost up to 25 has little impact on the server. Above 50 has a high impact, and may result in slower response times.

Each compile adds to this log. If you want FirstClass to start a new log, delete the old one.

Caution

Be sure to correct any errors reported by the log before your new or updated rule runs.

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[Obtaining secure certificates](#)
[Generating certificate files](#)
[Exchanging S/MIME messages](#)

Your administrator determines the level of security that FirstClass normally uses for the exchange of email, and you can specify the security level for particular connections.

If you want to send a message containing particularly sensitive material at a security level that is higher than normal, you can take advantage of FirstClass' S/MIME support. This support works on a per-message basis, so that you can continue to use FirstClass' normal security level for regular messages.

S/MIME is a method for sending and receiving encrypted messages, typically involving the exchange of digital certificates that contain encryption keys.

To use an S/MIME message, both you and your intended recipient must have secure certificates. For help in obtaining certificates, contact your administrator. What follows is a general description of the procedure that both you and your intended recipient must follow.

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Obtaining secure certificates

You must order a secure certificate from a third party, known as a certificate authority. You will receive a link from the certificate authority for downloading your certificate.

To download the certificate, you normally use the same browser and computer you used when you requested the certificate. The certificate installs on your computer after the download.

After your certificate is installed on your computer, you must generate a certificate file.

Generating certificate files

You can't use FirstClass to generate your certificate file. You must use an external application, such as Outlook Express. This procedure assumes that you are using Outlook Express version 5 or 6.

To generate your certificate file:

1. Choose Tools > Options.
2. Click Digital IDs on the Security tab.
3. Choose Secure Email at "Intended purpose".
4. Select your certificate.
5. Click Export.
6. Follow the prompts.

   When asked:

   - export the private key
   - include all certificates in the certification path
   - enable strong protection.

   You will also be asked to provide a password for the private key. This is actually optional, and you must be aware of the implications if you password protect your private key.

Deciding whether to password protect your private key

A password protected private key provides an additional layer of security. With a password protected private key, only you can use this certificate to send S/MIME messages, because your password must be provided with every S/MIME message that is sent.

However, FirstClass can't decrypt S/MIME messages received by someone with a password protected private key. Message recipients will see a blank message with an encrypted attachment. They will have to download the attachment and use an external application to decrypt it.

If you choose not to supply a password, FirstClass can automatically decrypt S/MIME messages.

Note
Normally, a certificate provided by your organization doesn't require a password protected private key.

What to do with your certificate file

After you have generated your certificate file, send it to your administrator, who will store it in a location where FirstClass can access it.

You must tell your administrator the email address you used when you ordered the certificate. If you don't remember the address, do the following (again, this assumes you are using Outlook Express version 5 or 6):

1 Choose Tools > Options.

2 Click Digital IDs on the Security tab.

3 Select your certificate.

4 Click View.

5 Select "Subject" on the Details tab.

The "E =" value is the email address.

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Exchanging S/MIME messages

To send a message using S/MIME:

1 Choose Message > New Message Special > S/MIME Message.

2 Update the S/MIME Message form.

If this is the first S/MIME message you have exchanged with this recipient, choose Signed at "S/MIME type". You can't send an encrypted message to this recipient until you have the recipient's public key, as described below.

3 Send the message.

FirstClass automatically attaches a certificate containing your public key.

The first time you exchange S/MIME messages

When you send an S/MIME message to someone for the first time, that recipient must send the attached certificate to their administrator. That administrator will store your certificate in the same place as the recipient's certificate. When the recipient replies, their certificate is attached to the reply. You must now send the recipient's certificate to your administrator for storage.

Both you and your recipient now have copies of each other's public keys. From now on, each time you send an encrypted S/MIME message to this recipient, FirstClass will use the recipient's public key to encrypt it. Therefore, you can exchange future S/MIME messages without having to involve your administrators.

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Contact Management

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Viewing contact databases
Adding personal addresses
Creating mail lists
Grouping your contacts

About contact management

FirstClass lets you store personal contact information, such as the email address, phone number, and street address of a friend. This information is stored in a personal address. Personal addresses provide a quick way to address messages to both people who aren't registered on your server and people who are, but whom you address, say, by nickname.

You can also create mail lists.

Tip
We recommend that you create a conference instead of a mail list, to reduce Mailbox clutter, if all recipients would have access to your conference.

Personal addresses and mail lists can be in your Contacts folder, where only you will see them, or in public contact databases, where others can see and contribute to them. You, your administrator, and other users can create contact databases and share them with other users.

When you add personal addresses and mail lists, they are added to your personal view of the Directory. In the case of a contact database, you must place a link to it in your Contacts folder, or copy entries from it to your Contacts folder, to see the contact database entries in your view of the Directory.

Exceptions
Personal addresses aren't added to the Directory if they are lacking email addresses, or if your administrator didn't give you access to the contact management feature. If you don't have the contact management feature, you can still create personal addresses purely for reference.

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Your Contacts folder

All FirstClass users have personal Contacts folders on their Desktops. Your Contacts folder contains personal addresses and mail lists that you have added for your own use.

To open your Contacts folder from a window other than your Desktop, choose File > Open > Contacts Folder.

Don't move your Contacts folder off your Desktop, or it won't work. If you moved this folder off your Desktop in error, you can move it back, and it will work again.

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Viewing contact databases

There are several ways you can control how you view contact information in your Contacts folder and other contact databases.

Contact database viewing tips

If you show the contacts in Index Card view, you will have immediate access to standard information, such as phone numbers, so that you can call someone without having to open their personal address form.

If you want your contacts sorted by last name, show them in List view, then add the Last Name column and sort by this column.

Controlling how you view personal address information

FirstClass supplies several versions of the form you use to add and store personal addresses. For example, if you are used to an Outlook or Palm personal address form, there are FirstClass forms that have a similar layout.

Choose the form you want to use in your Contacts folder, and as the default form in any contact databases that you create, in your general preferences. Choose the form you want to use for a specific contact database in that contact database's permissions.

Navigating to a particular name

To go to the first name that starts with a particular letter, or starts with a number, click the appropriate button at the right of the contact database window.

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Adding personal addresses

You can add personal addresses to your Contacts folder or to any other contact database.

Adding personal addresses to your Contacts folder

1 Choose File > New > New Contact.

Shortcut
If the address you want is in a FirstClass message or document, select the address, then choose Collaborate > Add to Contacts Folder. This prefills some of the personal address information.

2 Update the New Personal Address form.

Adding personal addresses to contact databases

1 Open the contact database.

2 Choose File > New > New Contact.

3 Update the New Personal Address form.

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Creating mail lists

To create a mail list:

1 Choose File > New > New Mail List.

If you want to create the mail list in a public contact database, open the contact database first.

2 Update the New Personal Mail List form.

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Grouping your contacts

You can create contact databases within your Contacts folder, or another contact database, to organize contact information.

For example, you can create a contact database for all contacts involved with a special project, then move or copy entries into this contact database. You can share this contact database just as you would any other contact database.

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About importing and exporting personal addresses
Importing personal addresses using vCard format
Importing personal addresses using Excel format
Exporting personal addresses

About importing and exporting personal addresses

You can import personal address information about your contacts from other applications, such as Outlook Express, or export your personal addresses from FirstClass.

In both cases, the transfer is done using vCard (.vcf file) or Excel (.csv file) format. vCard is a common format for transporting address information between applications. Excel format consists of comma, tab, or semicolon delimited data.

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Importing personal addresses using vCard format

To import personal addresses:

1 Export the data from the other application as a .vcf file.

2 Choose File > Import > Import Personal Contacts in FirstClass.

If you want to import to a public contact database, open the contact database first. Otherwise, the personal addresses are created in your Contacts folder.

3 Select the .vcf file.

To import a .vcf file that is attached to a message, select it, then choose Collaborate > Add to Contacts Folder. The personal addresses are added to your Contacts folder.

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Importing personal addresses using Excel format

To import personal addresses:

1 Prepare the data for importing.

Open the address book in the other application, then save the fields you want to export as a comma, tab, or semicolon delimited text file with an extension of .csv. If the other application can't save the data in this format, try importing the data into a spreadsheet program and saving it from there.

2 Choose File > Import > Import Personal Contacts in FirstClass.

If you want to import to a public contact database, open the contact database first. Otherwise, the personal addresses are created in your Contacts folder.

3 Select the .csv file.

FirstClass displays the fields in the file, and the FirstClass fields to which they will map.

4 Change field mappings, if required, by choosing new FirstClass fields from the dropdown fields.

To import a .csv file that is attached to a message, select it, then choose Collaborate > Add to Contacts Folder. The personal addresses are added to your Contacts folder.

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Exporting personal addresses

To export personal addresses:

1 Select the Contacts folder or a contact database.

If you want to export only certain addresses, open the Contacts folder or contact database and select them.

2 Choose File > Export.

3 Select "Export personal addresses".

4 Select the export format you want at "Personal address export format":

- vCard
- For Use with Outlook - exports only the information of use to Outlook in Excel format
- For use with BlackBerry - exports only the information of use to BlackBerry in Excel format
- For use with FirstClass - exports all information in Excel format.

5 Select the location where you want the file to be saved.

6 Rename the file, if desired.

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Creating contact databases
Setting contact database permissions

Creating contact databases

You can create contact databases just as your administrator does. If you have trouble getting your contact databases to work as you expect, contact your administrator.

To create a contact database:

1 Open the container where you want the contact database.

2 Choose File > New > New Contact Database.

The new contact database opens.

3 Open the contact database's properties, then type the contact database name at "Name".

You can update other information on the Info form, if desired.

Shortcut
To name the contact database without opening the Info form, click the name of the New Contact Database icon twice to make it editable, type the contact database name, then press Tab.

4 Set contact database permissions.

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Setting contact database permissions

To specify the permissions for your contact database:

1 Select or open the contact database.

2 Choose Collaborate > Permissions.

3 Update the Permissions form.

Your changes are saved automatically when you close this form.

Tip
If you created the contact database in an area that others can't access, you must subscribe users before they can use this contact database.

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Transferring Files

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About transferring files
Specifying the default folder for downloaded files
Interrupted file transfers

About transferring files

There are several methods for making files, such as word processing or graphics files, available to other users, or saving them for your own use. Files must be on the server before they can be shared, so no matter which method you use, files that only exist on your own computer are first uploaded.

Note
If you are working with a large file that is only on your own computer, and you, or someone who might download this file, use a modem, consider compressing the file before uploading it. Compressed files often transfer faster and take up less space on the server.

You can share a file by attaching it to a message or by storing it in a container. If you attach the file to a message, you can add explanatory text in the message body. If you store the file in a container, it is available to anyone with access to that container.

Uploads and downloads (file transfers) take place in the background. While they are going on, you can perform other tasks, including initiating more file transfers. While file transfer is taking place, the File Transfer form is displayed, indicating file transfer progress. After transfer is complete, you can click Open Folder to open the container that holds the files you transferred. If you want this form to close automatically when file transfers are complete, select "Close when finished" before you close the form.

About our terminology

We refer to sharing files, but you can also share FirstClass objects, such as documents, personal addresses and mail lists, bookmarks, and voice greetings.

We describe attaching files to messages, but you can also attach files to other FirstClass objects, such as documents, calendar events and tasks, and personal addresses.

Note
FirstClass objects attached to messages cannot be transferred over the Internet.

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Specifying the default folder for downloaded files

When you download a file, FirstClass suggests a default folder as the destination.

To change the default destination folder for downloaded files, select the folder you want as the default at "Download folder" in your general preferences.

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Interrupted file transfers

Interrupting file transfers

FirstClass lets you interrupt file transfers before they are complete, and, in some cases, resume these transfers from the point they were interrupted. You may also be able to resume file transfers that were interrupted due to problems such as power failures.

You can interrupt a file transfer as long as the Cancel button is still displayed on the File Transfer form. To interrupt the file transfer, click Cancel.

If you try to disconnect from the server or quit FirstClass before a file has been transferred, you are notified of the file transfer. To stay connected and continue the file transfer, click Cancel. To disconnect immediately and interrupt the file transfer, click Disconnect Now. If you do nothing, the file transfer is completed before you are disconnected or FirstClass quits.

The name of a file that has not been completely transferred is in italics.

Resuming file transfers to servers

Whether you are uploading a file directly to a container or attaching a file to a message, you can resume an interrupted transfer. If the file was being attached to a message, you can resume the file transfer as long as the message is unsent.

To resume a file transfer, select the partially transferred file, then repeat the file transfer procedure you followed originally. The balance of the file is transferred.

Resuming file transfers to your computer

To resume a file download to your computer, repeat the download procedure you followed originally. Select the same destination as you did before, and replace the existing file when prompted. The balance of the file is downloaded.

Note
If you try to resume file transfer by dragging the file, the file transfer will start from the beginning.

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Attaching files to messages
Previewing attached files
Attaching recordings to messages
Downloading attached files

Attaching files to messages

To attach a file to a message:

1 Choose File > Attach with the message open.

Shortcut
You can drag files to the message header to attach them. This is the only way to attach FirstClass objects. If you drag files, skip the remaining steps; file transfer begins immediately. You can also drag an attachment from an existing message or a file that was uploaded directly to the server.

2 Select the file you want to attach.

You can select multiple files.

After a file is transferred, it is displayed in the "Attachments" field of your message. To remove an attachment, select it, then press Delete.

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Previewing attached files

FirstClass lets you preview an attached file before you download it. To do this, select the attachment, then choose File > View File. The file opens in a viewer window.

Shortcut
Double-click the attachment.

Working with previews

In the viewer window, you can control how the file is displayed, and print and save the file, as described in Embedding pictures in content. For example, you can properly orient a fax that is upside down by rotating it.

To move from page to page of a multipage fax, click Next Page or Previous Page.

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Attaching recordings to messages

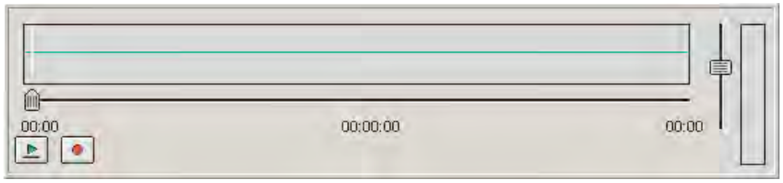
If your computer is connected to a microphone, you can use FirstClass to record a spoken message, or any other sound, and attach this recording to a message as a .wav file.

Note
You can also attach existing .wav files, as well as AIFF and MP3 files. In addition, you can embed recordings in content.

To use your microphone to attach a recording to a message:

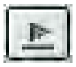
1 Choose Edit > Insert > Insert Voice with the message open.

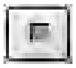
A voice player pane is added to the message header.



 Record

 Stop Recording

 Play

 Stop Playback

 volume control

2 Click Record.

3 Use your microphone to record your message or sound.

4 Click Stop Recording when you are finished recording.

A .wav file attachment is added to the message header.

To review the recording, click Play. You can adjust the volume using the volume control button.

To change the recording, delete the .wav attachment and click Record again.

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Downloading attached files

You can only download attached files using the method described here, not attached FirstClass objects such as documents.

To download an attached file:

1 Select the attachment in the message header.

You can select multiple attachments.

2 Choose File > Save Attachment.

Shortcut
Drag the attachment to the desired location on your computer. If you drag the attachment, skip the remaining step; file transfer begins immediately.

3 Select the location where you want the attached file to be saved.

Note
If a conference message with an attachment appears in italics, the attachment has not yet been approved for download. You cannot open this message and download the attachment until it is approved and the italics are gone.

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Importing and exporting calendar items
Importing and exporting personal addresses

Storing files in containers
Changing the subjects of uploaded files
Copying attached files to containers
Copying stored files to your computer

Storing files in containers

You can store a file in a container in two ways:

- upload the file

  Files that are uploaded retain their file types. For example, an uploaded .rtf file is still a .rtf file. You cannot perform FirstClass actions, such as searching, on an uploaded file.
- import the file.

  Files that are imported are converted to FirstClass documents where possible. This means that you can perform the same FirstClass actions on these documents as you can on any other FirstClass document. If FirstClass cannot convert a file, it will be uploaded instead.

  If you import a file that is a previously exported FirstClass object, that object is recreated.

Note
You can upload and import a folder just as you would a file. In both cases, a folder is created in FirstClass. If you uploaded the folder, its contents retain their file types. If you imported the folder, its contents are converted to FirstClass documents where possible.

To upload a file

1 Open the container to which you want to upload the file.

2 Choose File > Upload.

Shortcut
You can drag files to the container to upload them. If you drag files, skip the remaining step; file transfer begins immediately.

3 Select the file you want to upload.

You can select multiple files or a folder.

After a file is uploaded, it has the subject Uploaded File. You can change this subject if desired.

To import a file

1 Open the container to which you want to import the file.

2 Choose File > Import > Import Files and Folders.

3 Select the file you want to import.

You can select multiple files or a folder.

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Changing the subjects of uploaded files

You can change the subject Uploaded File to make it more descriptive. To do this, open the uploaded file's properties, then type the subject you want at "Subject".

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Copying attached files to containers

You can place a copy of a file attached to a message into a container. To do this, drag the attachment to the container.

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Copying stored files to your computer

You can copy files stored in containers to your computer in two ways:

- download the file

  If you are downloading a file, it retains its file type. For example, a downloaded .htm file is still a .htm file. It also retains information such as modification date. If there is a file with the same name at the destination, the downloaded file will overwrite it.
- export the file.

  If you are exporting a file, it retains its file type. For example, an exported .htm file is still a .htm file. If there is a file with the same name at the destination, a number will be appended to the exported file's name.

Tip
You can download and export a container just as you would a file. In both cases, a folder is created on your computer (conferences are converted to folders). The contents of the container are treated in the same way as if you had downloaded or exported an individual file.

Copying FirstClass objects to your computer

You can also download or export a FirstClass object such as a document or message. Attachments are not downloaded. You must download them separately.

Downloaded FirstClass objects are converted to .rtf files. Header information is included.

Exception
If you give the FirstClass object a name ending in .txt, .html, or .rtf prior to downloading, the object is downloaded without any conversion.

Exported FirstClass objects are converted to .rtf files. Header information is presented in FCML format.

To download a file

1 Select the file.

You can select multiple files.

2 Choose File > Download.

Shortcut
Drag the file to the desired location on your computer. If you drag the file, skip the remaining step; file transfer begins immediately.

3 Select the location where you want the file to be saved.

To export a file

1 Select the file.

You can select multiple files.

2 Choose File > Export.

3 Select "Export files, messages, and documents".

4 Select the location where you want the file to be saved.

You can also rename the file.

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Calendars

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About calendars

Your personal FirstClass calendar is like a personal organizer. It records calendar events and tasks.

Unlike a personal organizer, you can permit other people to view and update your FirstClass calendar. This allows everyone to schedule meetings at mutually convenient times.

FirstClass calendars work much like conferences; your administrator may create public calendars and give you access to them, or you can create your own calendars and give others access to them.

Top

Types of calendars

FirstClass supports the following types of calendars:

- personal calendar

  This is your own calendar. You can limit others' access to your personal calendar by updating your calendar permissions, just as you would update the permissions of a calendar that you created.

- group calendar

  A public calendar that lets a specific group of people coordinate their time and tasks.

- resource calendar

  A public calendar that represents a specific resource, such as a projector. A resource calendar is updated when users book the resource as part of creating a calendar event.

- location calendar

  A public calendar that represents a specific resource, such as a meeting room. Location calendars are updated just like resource calendars.

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Opening calendars

To open your personal calendar, choose File > Open > Calendar.

To open another user's calendar, open the shortcut menu from the user in the Directory, Who's Online list, message headers, or Instant Message forms, then choose Open User Calendar.

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Calendar views

You can split a calendar into panes, and look at it using the same views, as you do for conferences. While in these views, you can do the same things you do with messages. For example, in List view you can sort calendar events.

In addition, there are the following specialized calendar views:

- month

  Shows the least detail, and highlights the current day. Choose View > View by Month.
- week

  Highlights the current day. Choose View > View by Week.
- day

  Shows the most detail, in time slots. Tasks and untimed events are displayed at the top of this view. Choose View > View by Day.
- Today list.

  Shows events that take place today and tasks that start today or are still ongoing. Choose View > View Today List.

  This view includes a mini month pane. The bigger you make this pane, the more months you will see in it. Days containing events are in bold.

You can select the view you want for each pane of the calendar.

Customizing calendar views

You can customize your calendar views in the following ways:

- display week numbers (month and week views)
- change the day on which the week starts (month view and mini month pane).

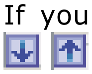
To customize your calendar views, make the changes you want in your calendaring preferences.

Top

Calendar navigation

The navigation buttons in the top right corner of the special calendar views let you scroll backward and forward through calendar pages. You can also return to the current month, week, or day.

If you see one of these buttons in day view



it means there are items out of sight. Click the button to display the items.

To open the first unread item, choose Collaborate > Navigation > Next Unread.

Using the mini month pane to navigate

You can use the mini month pane of the Today list view to navigate and change the view in the other pane. For example, if your calendar has a vertical split bar, and you are displaying the Today list in the left pane, selections in the mini month calendar affect the view in the right pane.

To change the months displayed in the mini month pane, click

◀ or ▶

To change the years, click

◀◀ or ▶▶

Making selections in the mini month pane

To select a specific date in the mini month pane, click it. To select multiple consecutive dates, do one of the following:

- click the first date, then drag the cursor over the remaining dates

- click the first or last date, then press Shift plus the forward or back arrow key as many times as required.

To select a week, click to the left of it. To select multiple weeks, click to the left of the first week, then drag the cursor straight down until all desired weeks are selected.

To select a month, click its name.

To change your selection, you can:

- press the forward or back arrow key

  If you had one day selected, the next or previous day is selected. If you had one month selected, the next or previous month is selected.
- press the up or down arrow key.

  If you had one day selected, the same day in the next or previous week is selected. If you had a block of days selected, the next or previous corresponding block is selected (for example, the next or previous week).

How the mini month pane affects the view

Assuming that you have the Today list and mini month pane displayed in the left pane, these are the changes you will see in the right pane as you make selections in the mini month pane.

If you select one date, that date is displayed in day view. If you select multiple dates, they are all displayed in day view.

If you select a week, that week is displayed in week view. If you select multiple weeks, they are all displayed in week view.

If you select a month, that month is displayed in month view.

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Printing calendars

To print a calendar immediately, using your print layout defaults, click the Print toolbar button. The active pane is printed in the current view.

If you choose File > Print, the Print Layout form opens, allowing you to specify the dates and view you want to print.

Note
Any changes that you make on the Print Layout form are not saved as defaults when you open this form using File > Print.

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Calendar reminders

When you create a calendar event or task, you can tell FirstClass to generate a reminder at the time you specify. Event participants can change this for their copies of the event.

The reminder appears as a popup window if you are logged into a server. To see the details of the event or task, click Details in this window. To make this reminder reappear, specify when you want to see the reminder again at "Snooze", then click Snooze.

To specify a default reminder time for all events and tasks that you create, select "Set default reminder" and choose or type the time in your calendaring preferences.

If you aren't logged in, the reminder is sent to your Mailbox as a message.

Forwarding calendar reminders to pagers

FirstClass can notify you of calendar reminders through your pager, if you have an email-enabled paging system.

To forward calendar reminders to your pager, update your paging preferences. Choose Yes or Urgent Only at "Calendar items".

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Adding calendar events
Viewing calendar events
Updating calendar events
Deleting calendar events
Responding to invitations
Sending invitations over the Internet

Adding calendar events

To add an event to a calendar:

1 Open the calendar.

2 Choose File > New > New Event.

Shortcuts
To create an event that starts on a particular day, double-click either the blank space under the day you want or the date itself, or open the shortcut menu from the day, then choose New Event.

In day view, double-click the start time you want, or click the start time and Control-drag (Windows, Linux) or Option-drag (Mac OS, Mac OS X) to the end time.

3 Update the basic event information on the New Calendar Event form.

The default start time and duration are based on values in your calendaring preferences. FirstClass looks for a free time slot within your normal work day (as defined by your preferences).

4 Update the Scheduling tab to invite participants, book resources that are in the Directory, and check that there are no conflicts.

If there are conflicts, you can reschedule the event using this tab.

5 Update the Repeat tab, if you want the event to show up repeatedly on the calendar.

If you make the event repeat, this icon is displayed beside the event:

6 Update the Reminders tab, if you want to generate reminders.

If you add reminders to the event, this icon is displayed beside the event:

7 Attach files or add content just as you would for a message, if necessary.

8 Choose Message > Priority > Priority Urgent, if you want to make the event urgent.

The event will appear in bold on calendars.

The event is added to your calendar when you close the calendar event form. If a participant has a personal calendar, this event is added to that calendar. If a participant does not have a personal calendar, this form is sent to the participant's Mailbox as a message.

Notes
If you don't have permission to add events to a user's calendar, the event is sent to that user's Mailbox.

Depending on how your administrator set up your account, events that you create in a group calendar may be added directly to that calendar, or the events may be added to your personal calendar, with copies placed in the group calendar.

Adding events from other calendars

You can copy events from one calendar to another. This can be useful for adding events from group calendars to your personal calendar.

To copy an event to another calendar, drag it from the source calendar to the appropriate date on the target calendar.

Top

Viewing calendar events

As is the case for messages, a calendar event that was sent to you is flagged as unread until you open it or turn the unread flag off.

Opening an event lets you view all its details. In month or week view, you can see the same details you see in day view in the event's tooltip.

If the event includes a mail list as a participant, you can see who belongs to the mail list by selecting it from the Scheduling tab, then choosing Open User Info Form from the shortcut menu.

Top

Updating calendar events

To change details about an event that you created, open it, make your changes, then close the event form.

If you change the start date, the event will move to the new date on the calendar. The event is also moved and reflagged on participants' calendars.

Caution
Try to minimize updating events with participants. Participants can customize their copies of events, and your updates will override that customization.

If you delete a participant, the event is removed from that participant's calendar.

Exceptions
Updates will not be reflected in the calendars of users who were invited as part of a mail list, or are participants of an event created in a group calendar.

Shortcuts
To change the date of an event, you can drag it to a new date. Dragging an event to the Today list is the same as dragging it to today's date on the calendar.

To change the time of an event in month or week view, you can hover the cursor over it and drag, just as you can in an opened event form. In day view, drag the event to a new time, or change the start or end time by dragging the top or bottom of the event box.

Changing one occurrence of a repeating event

If you make a change to an event which is one of a series of repeating events, then close the event, you are asked if you want to change all of the repeating events, all repetitions starting with the current one, or just the current repetition.

Updating received events

If you are invited to an event, a copy of the event is added to your personal calendar.

You can change the color or category of this event, and change when (or if) a reminder is generated for the event. This customization only affects your copy of the event.

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Deleting calendar events

If you are creating a calendar event and decide you do not want it, you can delete it while it is still open, just as you would an open message.

If you delete an event that you created previously, the event is removed from all participants' calendars.

Exceptions
Deleted events won't be removed from the calendars of users who were invited as part of a mail list, or were participants of an event created in a group calendar.

You can delete one occurrence of a repeating event that you have created. If you delete a repeating event that was placed on your calendar by someone else, all occurrences are deleted.

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Responding to invitations

When you receive an event invitation, open the event, then click the appropriate button:

- Accept accepts the invitation
- Tentative accepts the invitation, but indicates that you may be unavailable
- Decline declines the invitation and creates a reply message so that you can provide an explanation.

An icon corresponding to your response is placed beside your name on the Scheduling tab.

Note
If the person who invited you isn't on your server, she will see neither this icon nor any indication in the event history that you accepted or declined. For this reason, a reply is always created for that person.

Top

Sending invitations over the Internet

If you invite someone who has an Internet address (an address that contains @) to participate in your event, the recipient will receive a message with a vCalendar attachment. This attachment can be imported into the recipient's own calendaring application.

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[Adding calendar tasks]
[Deleting calendar tasks]
[Viewing calendar tasks]
[Updating calendar tasks]

Adding calendar tasks

To add a task to a calendar:

1 Open the calendar.

2 Choose File > New > New Task.

Shortcuts
To create a task that starts today, double-click within the blank space in the Today list. To create a task that starts on any other particular day, open the shortcut menu from that day, then choose New Task.

3 Update the basic task information on the New Calendar Task form.

4 Update the Reminders tab, if you want to generate reminders, before the start and due dates, for a task with a due date.

If you add reminders to the task, this icon is displayed beside it:

5 Attach files or add content just as you would for a message, if necessary.

The task is added to your calendar when you close the calendar task form.

Adding tasks from other calendars

You can copy tasks from one calendar to another. This can be useful for adding tasks from group calendars to your personal calendar.

To copy a task to another calendar, drag it from the source calendar to the appropriate date on the target calendar.

Top

Deleting calendar tasks

If you are creating a calendar task and decide you do not want it, you can delete it while it is still open, just as you would an open message.

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Viewing calendar tasks

Incomplete tasks move to the Today list on their start dates, and stay there until they are completed. Once completed, they show on the completion date in other views.

Overdue tasks are shown in red. Completed tasks appear on the date of completion, with a red line through them.

To see task details, open the task. You can also see some details in the task's tooltip.

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Updating calendar tasks

To change details about a task, open it, make your changes, then close the task form.

If you change the start date, the task will move to the appropriate date on the calendar.

Shortcut
To move a task, you can drag it to the new start date. Dragging a task to the Today list is the same as dragging it to today's date on the calendar.

Changing calendar task status

To change the status of a task, choose the appropriate status at "Task state" on the task form.

If you choose Completed, today's date appears at "Completed on". You can change this date if necessary. If you drag a completed task to another date, the "Completed on" date changes accordingly.

Shortcut
If you do not already have the task open, you can change the task status to Completed by clicking the task icon. Clicking this icon again changes the status back to Not Completed.

Completed tasks drop to the bottom of the list.

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[About importing and exporting calendar items]
[Importing calendar items]
[Exporting calendar items]

About importing and exporting calendar items

You can import items from an external electronic calendar into a FirstClass calendar, or export calendar events and tasks from FirstClass.

Imports use vCalendar format (a .vcs file). vCalendar is a common format for transferring calendar information between applications.

Exports use vCalendar or Excel format (a .csv file). Excel format consists of comma, tab, or semicolon delimited data.

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Importing calendar items

When you import a .vcs file, events are converted to FirstClass calendar events, and to-dos are converted to FirstClass calendar tasks. All imported calendar items are placed in your personal calendar. Any information that doesn't belong in FirstClass' calendar event and task fields is placed in the event or task bodies.

To import external calendar items:

1 Choose File > Import > Import Calendar.

2 Select the .vcs file.

To import a .vcs file attached to a message, select it, then choose Collaborate > Add to Calendar. The events and tasks are added to your personal calendar.

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Exporting calendar items

To export the items in a FirstClass calendar:

1 Select the calendar.

If you want to export only certain items, open the calendar and select them.

2 Choose File > Export.

3 Select "Export calendar events and tasks".

4 Select the export format you want at "Calendar export format":

- vCalendar
- For use with BlackBerry - exports all information of use to BlackBerry in Excel format.

5 Select the location where you want the file to be saved.

6 Rename the file, if desired.

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Creating calendars
Setting calendar permissions
Providing information about calendars
Updating calendars' Directory entries

Creating calendars

You can create group, resource, and location calendars just as your administrator does. If you have trouble getting your calendars to work as you expect, contact your administrator.

To create a public calendar:

1. Open the container where you want the calendar.
2. Choose File > New, then the appropriate type of calendar.

   The new calendar opens.
3. Open the calendar's properties, then type the calendar name at "Name".

   You can update other information on the Info form, if desired.

   Shortcut
   To name the calendar without opening the Info form, click the name of the new calendar icon twice to make it editable, type the calendar name, then press Tab.
4. Set calendar permissions.

   Tip
   You can also change permissions for your personal calendar, if you want to change the expiry period for items in your calendar, give other users more or less permission to use your calendar than is normally allowed, or subscribe other users so that your calendar appears on their Desktops.

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Setting calendar permissions

To specify the permissions for your calendar:

1. Select or open the calendar.
2. Choose Collaborate > Permissions.
3. Update the Permissions form.

Your changes are saved automatically when you close this form.

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Providing information about calendars

You can provide other users with information about a calendar by creating a résumé for it. To do this:

1. Choose Collaborate > Permissions with the calendar open or selected.
2. Click About.
3. Update the Personal Address form.

Your changes are saved automatically when you close this form.

To see calendar information, users can select your calendar, then choose Collaborate > About Conference.

Top

Updating calendars' Directory entries

A calendar's Directory entry shows you information that includes the calendar location and whether it can be viewed when users see Directory lists. You can update certain calendar information. To do this:

1 Choose Collaborate > Permissions with the calendar open or selected.

2 Click Directory.

3 Update the Directory Information form.

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Instant Messaging

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Responding to instant message invitations
Joining public chat rooms
Starting private instant messages
Creating public chat rooms
Setting instant messaging preferences

About instant messages

FirstClass' instant messaging feature allows you to have an online conversation with users who are currently connected to a server. The Instant Message form contains a transcript pane that records everyone's contributions to the instant message.

Instant messages may take the form of temporary sessions that only exist until the last participant leaves, or permanent chat rooms that are available inside containers.

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Responding to instant message invitations

If you are invited to an instant messaging session, an invitation is displayed that shows the name of the user who invited you.

To decline the invitation, click Decline. The sender (but not other participants) is notified that you have declined. If you don't want to join or send a notification, click Ignore.

To join the instant messaging session, click Accept. The Instant Message form opens and your name is added to the "Participants" list in the Instant Message forms of all participants.

Tip
Before you respond to an invitation, or during the instant message session, you can open the résumé of the person who invited you, or any other participant, to see more information about them. To do this, open the shortcut menu from the person's name, then choose Résumé.

If you are engaged in multiple instant message sessions, you can switch among them by clicking the appropriate Instant Message form.

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Joining public chat rooms

Public chat rooms appear with this icon:

When a chat room has active participants, there is a red balloon beside its icon:

To join the chat room, double-click it.

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Starting private instant messages

To use instant messaging with others, they must currently be connected to your server (their names appear in bold).

Note
Users whose names are in italics won't accept invitations.

To start an instant message:

1 Choose Collaborate > Instant Message.

Shortcut
Open the shortcut menu from any occurrence of the name you want to invite, then choose Instant Message. If you use this method, skip steps 2 and 3.

Note
If you want your instant message to have a particular name on invitations, fill in "Name" on the Instant Message form's Setup tab.

2 Click Invite to invite users to your instant messaging session.

A list opens, showing users who are currently connected to your server and will accept instant message invitations.

3 Select the users you want to invite.

If you are using an instant message type other than text, you can only invite users whose names are underlined. For more information on the types of instant messages available to you, contact your administrator.

Selected users receive invitations. If they accept, their names appear in the "Participants" list. If they decline, you are notified in the transcript. If they ignore the invitation, you aren't notified.

4 Contribute to the instant message as you would to any other instant message.

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Creating public chat rooms

To create a public chat room that is available permanently:

1 Open the container where you want the chat room.

2 Choose File > New > New Chat Room.

3 Open the chat room's properties, then type the chat room name at "Name".

You can update other information on the Info form, if desired.

Shortcut
To name the chat room without opening the Info form, click the name of the chat room icon twice to make it editable, type the chat room name, then press Tab.

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Setting instant messaging preferences

You can update your instant messaging preferences to specify whether:

- users can invite you

  If you prevent users from inviting you, your name appears in italics in the Directory and Who's Online list.

- instant messaging sounds will play.

You can use "Sounds" on the Instant Message form's Setup tab to override this preference for an individual instant message.

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Contributing to instant messages
Naming instant messages
Inviting others
Attaching files to instant messages
Embedding recordings in transcripts
Temporarily leaving instant messages
Saving transcripts
Moderating instant messages

Contributing to instant messages

To contribute to an instant message:

1 Type your input in the body of the Instant Message form.

You can format your input and embed pictures and other files just as you can in any content. You can also double-click embedded pictures to open them in a viewer window.

While you type your input, this icon tells other participants that you are preparing to send input:

2 Click Send or press Enter/Return.

As participants enter the instant messaging session and contribute to it, the transcript pane fills with everyone's input.

When you are ready to leave the instant messaging session, close the Instant Message form. Other participants are notified that you have left.

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Naming instant messages

If you start an instant message, you can give it a name that will show on invitations you send to others, and in the transcript's subject if you save it.

To name the instant message, fill in "Name" on the Setup tab.

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Inviting others

If you are participating in an instant messaging session started by someone else, you can click Invite to invite others to join the session just as you would when starting your own instant message.

Normally, newly invited users don't see earlier input in their view of the transcript. If you want these users to see this information, select "Enable catch up" on the Setup tab. Participants that you invite will see the transcript from the point you selected this field.

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Attaching files to instant messages

You can attach a file to an instant message, just as you would to a message. This file is displayed on the Attachments tab for all participants.

To attach a file, either choose File > Attach or click Attach on the Attachments tab.

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Embedding recordings in transcripts

If your computer is connected to a microphone, you can embed a spoken message, or any other sound, in the transcript. To embed a recording, click Push to Talk and make your recording. Keep this button depressed until you are finished recording. When you release, the recording is embedded in the transcript and plays for participants.

To replay the recording, click

To stop replay, click

To open the recording in a separate voice player window, double-click it.

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Temporarily leaving instant messages

If you will be unavailable for awhile, but don't want to leave the instant message permanently, you can make this icon appear beside your name in the "Participants" list, to let other participants know that you aren't currently available:

To do this, click Pause. When you are ready to rejoin the instant messaging session, click Pause again to remove the icon, or just send more input.

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Saving transcripts

 Note

Only an instant message creator can save the transcript.

To save a transcript, select "Save transcript" on the Setup tab. The transcript contains everything from the point you selected "Save transcript". It is saved after all participants have left.

A private instant message transcript is saved in the lower pane of your Mailbox.

A public chat room transcript is saved in the chat room's transcript pane.

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Moderating instant messages

If you want to control the contributions others make to an instant message, you can moderate it. In a moderated private instant message, only the instant message creator can allow others to contribute. In a moderated public chat room, only moderators can allow others to contribute.

To make an instant message moderated, select "Moderated" on the Setup tab. Other participants can no longer contribute. The following icon beside their names indicates that contributions by them are disallowed:

Participants can request permission to contribute by clicking Hand Up. You will see this icon beside the name of any participant who has clicked Hand Up:

To allow a participant to contribute, select the participant, then click Allow, or just click the "disallowed" icon beside the participant.

The icon changes to indicate that contributions are allowed:

To prevent a participant from making further contributions, select the participant, then click Disallow, or just click the "allowed" icon beside the participant.

To make the instant message nonmoderated again, so that everyone can contribute freely, clear "Moderated".

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Documents

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[Creating standard documents](#)
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About documents

You can create documents in your Mailbox, other containers, or on your Desktop. Because documents do not expire by default, and can be updated after they are created, they are useful for posting information on a permanent basis (for example, information about the purpose of a conference).

When you create a document, you can use the standard document form or a special document form that contains preset fields.

As for messages, you can add a background picture and content to a document, view it, make it stationery, or save it to your computer.

There are also special types of documents:

- memos are stored in your Memos folder
- presentations can be displayed as a series of slides.

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Creating standard documents

To create a document using the standard document form:

1 Open the container where you want to store the document.

2 Choose File > New > New Document.

3 Add and format the document content.

4 Attach files just as you would for a message, if necessary.

5 Identify your document.

You can give your document a name and subject, plus additional information to help refine searches. To do this, pull down the split bar and update the fields you want. Restore the split bar to its original location if desired.

Your changes are saved automatically when you close the document.

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Creating documents using special forms

To create a document using a special document form:

1 Open the container where you want to store the document.

2 Choose File > New > New Document Special, then the form you want to use to create this document.

3 Update the form.

4 Identify your document.

Open the document's properties, then update "Name" and "Subject".

Your changes are saved automatically when you close the document.

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Updating documents

To update a document, open it, make your changes, then close it.

If you are not allowed to make changes, the document may be protected.

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[Exporting memos](#)

Memos are documents that FirstClass places in a Memos folder on your Desktop. This folder is created the first time you create a memo. The contents of the Memos folder [sync](#) to Palm™ Computing connected organizers.

To create a memo:

1 Choose File > New > New Memo.

2 Update the memo just as you would a standard document.

Your changes are saved automatically when you close the memo.

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Exporting memos

You can export memos in a format that can be used in another application. To do this:

1 Select the Memos folder.

If you want to export only certain memos, open the folder and select them.

2 Choose File > Export.

3 Select one of the following:

- Export files, messages, and documents - exports memos in .rtf format
- Export memos for use with BlackBerry - exports the memo information of use to BlackBerry in Excel (.csv) format.

4 Select the location where you want the file to be saved.

5 Rename the file, if desired, if you exported the memos as a .csv file.

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[Creating presentations](#)
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Creating presentations

You can use FirstClass to create a slide presentation. This is essentially a specialized view of a document. All slides in the presentation are part of one document, divided by page breaks.

Caution
When you are creating your presentation, be sure to do it at the lowest screen resolution that you expect it to be viewed in. If you don't do this, you may find that your content does not fit properly in the presentation slides.

But note that there is a tradeoff. Presentations print based on the resolution at which you created them. At low resolutions, this can negatively impact the look of printed text.

To create a presentation:

1 Open the container where you want to store the presentation.

2 Choose File > New > New Presentation.

A presentation form opens in presentation display mode. It uses the default text formatting for presentations, as specified at "Presentation text" in your content edit preferences.

Note
You can also create a document using any document form and show it as a presentation. You can edit it in presentation display mode by choosing View > Content > Presentation View. This will not change your default text formatting to the presentation defaults.

3 Add and format the presentation content.

You can add a background picture as for any other document. You will find pictures designed as presentation backgrounds in FirstClass' Images folder. The background picture you add is displayed on every slide.

Insert a page break whenever you want to start a new slide. To move between slides, press Page Down or Page Up.

Notes
When you show a presentation, embedded links don't work. A recording embedded on a slide plays as soon as you display that slide, so it's best to have the recording as the first, or only, object on that slide.

4 Identify your presentation.

Update the "Name" and "Subject" fields in the presentation header to name the presentation and give it a subject.

Your changes are saved automatically when you close the presentation.

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Showing presentations

When you show a presentation, content is displayed one slide at a time, maximized to the full size of your screen. You cannot edit content at this time.

To show a presentation:

1 Open the presentation.

2 Choose View > Show Presentation.

3 Press Page Down to move from slide to slide.

   To return to the previous slide, press Page Up. To return to the first slide, press Home. To go to the last slide, press End.

4 Press Esc to end the presentation.

   The presentation reverts to the display mode in which it started.

Notes
You can also navigate and end the presentation using the shortcut menu.

An embedded recording plays automatically when its slide is displayed.

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Distributing presentations

You can give users who cannot access the container where a presentation is stored a copy of the presentation. To do this, address a message to the users, or to a conference that they can access, then attach the presentation just as you would any other document.

You can also create a message and format it as a presentation. Recipients can view this presentation just as they can any other presentation.

Providing user guidance

If you chose New Presentation to create your presentation, the presentation has a special icon. If you closed the presentation in presentation view, that is the view in which it will next open. Those are the only clues to users that this is a presentation.

You may want to include the word "presentation" in the name or subject of your presentation, to imply that users should show this as a presentation.

You can also tell users in your message that they should show this as a presentation, and recommend the screen resolution at which your presentation looks best.

Tip
You can force the presentation to open immediately in show mode by saving it in presentation mode, then protecting it.

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Sharing Personal Information

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About résumés
Updating your résumé
Viewing others' résumés

About résumés

FirstClass provides every user with a résumé, which is a special use of the Personal Address form, designed to contain users' personal information. Other users can open this form if they want to see information about you. Your résumé is blank until you update it.

In addition, conferences and calendars can have résumés to provide information about them.

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Updating your résumé

To add personal information to your résumé:

1. Choose File > Open > Résumé.
2. Update the personal address form.

   For ideas about what to write, look at other users' résumés.

Your changes are saved automatically when you close this form.

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Viewing others' résumés

To view another user's, a conference's, or a calendar's résumé:

1. Select the appropriate name in a location such as:
   - the Directory
   - a Who's Online list
   - a message header
   - the "Participants" list in an Instant Message form.
2. Choose File > Open > Résumé.

   Shortcuts
   Double-click the name. If you have permission to see other users' information forms, you may see these forms instead of their résumés when you double-click names. You can also see these forms by opening the shortcut menu from the name and choosing Open User Info Form.

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About the My Web Site folder

The My Web Site folder on your Desktop is the place to put material (web pages) that you want others to view using their web browsers. FirstClass publishes the contents of My Web Site on the web.

Don't move My Web Site off your Desktop, or it won't work properly. If you move this folder off your Desktop by mistake, you can move it back, and it will work again.

To open My Web Site, choose File > Open > Home Page.

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Creating content for My Web Site

To create content for My Web Site, you can:

- drag FirstClass folders, documents, and messages into this folder

  Note
  Any graphics that were embedded in messages or documents as .png files will be rendered on the web as .gif files.

- store links to containers by pressing Shift while you drag the containers to this folder

  Other users must have access to these containers (they must be able to follow the same paths to the containers), and they must have permission to use the containers. In addition, web users will only be able to view conferences if your administrator has set up these conferences to allow this. Web users who are not recognized by the server will be asked to log in when they try to access a restricted conference.

- upload plain text files directly to this folder

  These files can contain HTML code.

- create documents directly in this folder.

  These documents can contain HTML code. There are two special document forms for creating web pages. Personal Web Page hides the FirstClass toolbars and just shows the page content. Site Web Page also just shows the page content, but includes the site logo.

About HTML documents

Documents containing HTML code that are placed in My Web Site look like source code when you create them and view them using FirstClass, but are rendered as normal web pages when opened with a web browser.

To pass HTML code to a web browser unaltered, so that it will render properly on the web, format the HTML code by selecting it, then choosing Format > Style > Literal HTML. In FirstClass, this format is in fixed-pitch, plain text, and the text is invisible to users who can't edit the document.

An HTML document can contain URL links to other documents and image files that are located in My Web Site, as well as images embedded directly into the document.

Specifying a home page document

You can designate a document as your home page. FirstClass will open this document when My Web Site is opened with a web browser.

If you don't designate a home page document, anyone accessing this folder over the web will see its entire contents, just as you see them in the FirstClass client.

To make a document that was created using one of the special web page document forms your home page, name it "home page".

To make a document that was created using any other document form your home page, give it one of the following names:

- index.htm or index.html
- home.htm or home.html
- default.htm or default.html.

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Viewing others' web site contents

To see the contents of another user's My Web Site folder, connect to your server using your web browser. The FirstClass online help available through the web browser tells you how to view another user's web site contents.

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About the My Shared Documents folder
Creating content for My Shared Documents
Viewing others' shared documents

About the My Shared Documents folder

The My Shared Documents folder on your Desktop is the place to put objects that you want others to view using the FirstClass client.

Note
You can also use the My Documents folder to store objects, but other users can't view these objects. My Documents is simply a private place for your own material, such as work in progress.

Don't move My Shared Documents off your Desktop, or it won't work properly. If you move this folder off your Desktop by mistake, you can move it back, and it will work again.

To open My Shared Documents, choose File > Open > My Shared Documents.

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Creating content for My Shared Documents

To create content for My Shared Documents, you can:

- drag FirstClass folders, documents, and messages into this folder
- store links to containers by pressing Shift while you drag the containers to this folder

  Other users must have access to these containers (they must be able to follow the same paths to the containers), and they must have permission to use the containers.
- upload files directly to this folder
- create documents directly in this folder.

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Viewing others' shared documents

You can see the contents of another user's My Shared Documents folder by selecting that user in the Directory, then clicking Shared Documents.

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Working Offline

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About FirstClass Personal
Installing FirstClass Personal
Configuring FirstClass Personal
About your personal store

About FirstClass Personal

Only applies to Windows

Normally, you must be connected to a server to work with the objects on your Desktop. Over expensive communication links such as long-distance telephone connections, this can become costly. For this reason, we provide a FirstClass Personal application that lets you do many of the things you normally do, without being connected to a server full time.

Note
You can only use FirstClass Personal if you are classed as a Regular User. If you are classed as a Remote User, you cannot use this application. If you are unsure whether you can use FirstClass Personal, contact your administrator.

FirstClass Personal creates copies of the following in a personal store on your computer:

- your Mailbox
- your personal calendar
- conferences and public calendars that you want to see offline
- the Directory information you want to see offline.

FirstClass Personal connects to your server at the times you specify. When connected, this application replicates new information.

Tip
If you have an expensive connection, check your FirstClass Personal configuration to make sure you will not connect more frequently than you want.

What you can do with FirstClass Personal

These are the things you can do with FirstClass Personal:

- create messages, using the normal message forms
- read messages and other conference items
- attach files to messages, and save files attached to messages
- search your Mailbox or conferences
- send and retrieve messages
- use calendaring
- create and use offline Contacts and Bookmarks folders
- upload files directly to offline conferences and to your offline Desktop
- set up mail rules for automatic handling of mail replicated to your personal store.

  These rules are separate from any rules you set up online, and do not affect the online copies of mail.

These are things you can't do with FirstClass Personal:

- participate in instant messages
- upload files directly to folders
- create personal conferences.

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Installing FirstClass Personal

FirstClass Personal is not installed by default with the client. If you do not have FirstClass Personal installed, contact your administrator.

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Configuring FirstClass Personal

FirstClass Personal installs with default settings that you may never need to change. These defaults control:

- connection information
- when to connect to the server
- what to replicate
- how long to keep offline messages
- how to handle addresses for mail you send.

To change FirstClass Personal defaults:

1. Go to your offline Desktop.
2. Choose Collaborate > Work Offline > Configure Offline.
3. Update the FirstClass Personal Settings form.

If your password changes

If your password changes on the server, you must update the password on FirstClass Personal, or you will not be able to connect to the server using FirstClass Personal.

To update your password on FirstClass Personal, connect offline with your old password, then type the new password at "Host password" on the Connection tab of the FirstClass Personal Settings form.

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About your personal store

All your offline information is contained in the personal store folder. This folder is called FCPS.

It is important that you not make any changes directly to this folder or its contents, or FirstClass Personal may stop running. In this case, you might have to reinstall FirstClass Personal.

Do not:

- rename the folder
- move the folder, unless you also move the FirstClass folder to the same location
- change, delete, or move anything within the folder
- add files to any subfolders within the folder, unless instructed to by your administrator.

Backing up your personal store

Be sure you back up your personal store on a regular basis. We recommend at least once a week. This is a safeguard against losing your messages and offline Directory information in the event of hardware failure or data corruption.

The easiest way to back up your personal store is to copy the FCPS folder to a diskette.

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Starting FirstClass Personal
Your offline Desktop
Setting up your offline conferences
Reading and responding to messages offline
Sending messages offline

Starting FirstClass Personal

If you are currently connected to a server

To start FirstClass Personal:

1 Choose Collaborate > Work Offline > Connect Offline.

2 Supply the settings file, user ID, and password that you want to use to connect to the server when working offline.

3 Click Login.

If you are not currently connected to a server

To start FirstClass Personal:

1 Start FirstClass.

2 Supply the settings file, user ID, and password that you want to use to connect to the server when working offline.

3 Click Work Offline.

If this is the first time you have used FirstClass Personal

The Registration form opens when you start FirstClass Personal, showing the settings file and user ID with which you logged in. Ensure that this is how you want to connect to the server when working offline, then type your password.

The first time you work offline, FirstClass Personal may take several minutes to replicate information.

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Your offline Desktop

Your offline Desktop looks much like your online Desktop. It may contain offline versions of your Mailbox and personal calendar, plus an Offline Conferences folder containing copies of the conferences and public calendars you set up for offline work.

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Setting up your offline conferences

To save disk space, FirstClass Personal does not automatically show all the conferences to which you have access when you are connected to your server. You must tell FirstClass Personal which conferences you want to work with offline. You will have the same permissions for a conference offline as you do online; if you are not allowed to post to a conference online, you will not be able to do so offline.

After you have specified your offline conferences, the next time you work offline, FirstClass

Personal replicates any unread messages that are in these conferences. Within the offline version of your Offline Conferences folder, you will only see those conferences that contain unread mail. FirstClass Personal only creates these conferences offline when they contain unread mail.

Note
You can set up offline public calendars just as you do conferences.

Specifying offline conferences

To tell FirstClass which conferences to show offline:

1. Log into your server.
2. Choose Collaborate > Work Offline > Open Offline Conferences, if you have not yet started FirstClass Personal.

   The Offline Conferences window opens, and the Offline Conferences folder is placed on your Desktop, if it is not already there.
3. Select a conference that you want to access offline.
4. Choose Collaborate > Add to Desktop.
5. Drag the newly created link from your Desktop to the Offline Conferences folder.
6. Continue adding links to your Desktop and dragging them to your Offline Conferences folder until you have specified all the conferences you want to work with offline.

Removing offline conferences

If you no longer want to access a conference offline, delete it from both the offline and online versions of your Offline Conferences folder.

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Reading and responding to messages offline

You can read, save, print, forward, or reply to messages offline just as you would when working online.

You receive new mail when FirstClass Personal connects to your server. At that time, copies of unread messages are replicated. After replication, the online copies of these messages are no longer flagged as unread.

Note
When you read a message using FirstClass Personal, that message's history just indicates that the message was routed to you.

Deleting a message from your offline Mailbox or an offline conference does not affect the online copy of the message.

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Sending messages offline

You can send messages offline just as you would when you work online. When you are addressing messages to users rather than to conferences, you can use your offline Directory as an aid.

Note
Names that appear local when you work online look remote when you work offline. For example, Lou Kosta becomes Lou Kosta,HuskyPlanes in your offline Directory.

Your new messages are sent when FirstClass Personal connects to your server. To deliver a message immediately, choose Collaborate > Work Offline > Replicate Now.

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Problems using FirstClass Personal
FirstClass Personal console
FirstClass Personal log

Problems using FirstClass Personal

If an error occurs while you are working offline, FirstClass Personal reports the error in a message sent to your offline Mailbox. For more information on a specific error, contact your administrator.

You can't work offline

Make sure that FirstClass Personal has been installed correctly. Both the FirstClass Personal application and your FCPS folder must be in the FirstClass application folder.

FirstClass Personal doesn't connect to the server

Possible reasons for this error are:

- your settings file is not configured correctly
- FirstClass Personal is not configured correctly

  Make sure the user ID and password are correct in FirstClass Personal's settings.
- a modem connection failed.

No matching names found in Directory

When you are addressing a message, this error may occur because:

- you entered the name incorrectly
- you do not have an offline copy of the Directory, or it is out of date.

  If you specified that you did not want to replicate Directory information offline, you must configure FirstClass Personal to accept unknown names.

You can't access a conference

Possible reasons for this error are:

- conference replication is not set up correctly

  Remember to create a copy in the online version of your Offline Conferences folder for every conference you want to access using FirstClass Personal.
- automatic conference replication is disabled

  Either reconfigure FirstClass Personal to specify that you want conferences to replicate on each connection, or connect manually.
- you were never granted access to the conference

  Contact the conference owner to verify whether you have access to this conference.
- you don't have permission to see the conference.

  You have the same access permissions offline as you do online, so you will not be able to view conferences in FirstClass Personal that you cannot view online.

You get an error when FirstClass Personal tries to replicate

Check with your administrator to make sure that you are allowed to work offline.

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FirstClass Personal console

The FirstClass Personal console records offline activity as you use FirstClass Personal. To view the console, click the FirstClass Personal icon on the taskbar:

To record more detail in the console, choose one of the following:

- Personal > Trace Connection Activity

  Records detailed information about connection activity.
- Personal > Enable Replication Log.

  Records detailed information about replication.

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FirstClass Personal log

The FirstClass Personal log records offline activity as you use FirstClass Personal. This log is a text file that you can view with any application that displays plain text files.

This log is located in your FirstClass application folder. It is called fcspra.log.

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Platform Specifics

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[About FirstClass Plugin]
[The FirstClass explorer bar]
[How FirstClass Plugin integrates with your web browser]
[Quitting FirstClass Plugin]

About FirstClass Plugin

FirstClass Plugin for Microsoft Explorer (FirstClass Plugin) is a version of the FirstClass client that runs on your web browser whenever you access FirstClass content by entering an address that begins with fcp or clicking an fcp URL. You will see the FirstClass Login form, which lets you connect to your FirstClass server.

To use FirstClass Plugin, you must be running Internet Explorer in Windows, with FirstClass Plugin installed.

FirstClass Plugin behaves almost identically to the standalone FirstClass client, so you can read the rest of this help for instructions. This document details the major differences between the two clients.

To access the standard FirstClass menus, click FirstClass Menus:

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The FirstClass explorer bar

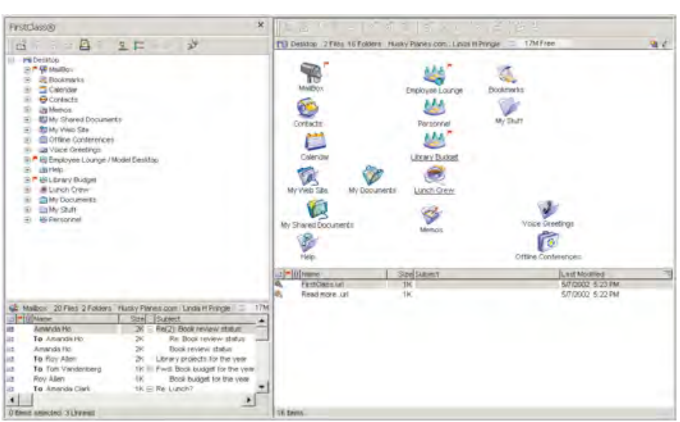
You can open an explorer bar for FirstClass Plugin, to aid in navigation. When the explorer bar is open, FirstClass operates much like the standalone client in Explore view.

Exception
To select an object, click it. To open an object, double-click it.

The explorer bar is similar to other explorer bars on your browser, such as Favorites. You can open and close the FirstClass explorer bar by choosing View > Explorer Bar > FirstClass, or by clicking the FirstClass toolbar button:

Note
FirstClass Plugin doesn't have to be running when you chose this menu item or click this button. If FirstClass Plugin wasn't running, it starts, and you see the FirstClass Login form.

This is a typical view of FirstClass Plugin with the explorer bar open:



The explorer bar consists of an upper and lower pane. The upper pane is the same as the left pane in the standalone client's Explore view (a hierarchical view of FirstClass objects). The lower pane shows the contents of an object selected in the hierarchical view.

The right pane shows the content of any object opened from the explorer bar.

Note
To open an object in a separate window, select it, then choose Open in New Window from the shortcut menu.

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How FirstClass Plugin integrates with your web browser

With FirstClass Plugin running, you can use both the client functionality of FirstClass and the web functionality of your browser. For example, you can:

- open external web pages while still connected to your FirstClass server

  This means, for example, that you can be looking at a web page and still be notified that someone wants you to join an instant messaging session.
- use your browser's Back and Forward buttons to scroll through the pages you have visited, just as you normally would on your browser

  If you have visited a mixture of FirstClass pages and web pages, you will see them all in sequence.
- drag URL icons from your browser's "Address" field to your Bookmarks folder in the FirstClass explorer bar

  Because your bookmarks are stored on the FirstClass server, you can access these URL links from any computer you use to connect to your server.
- view links to the FirstClass pages you have visited by showing the History explorer bar and opening My Computer
- add FirstClass pages to your browser's Favorites explorer bar, or to the links bar.

  Tip
  If you want to start FirstClass Plugin without an existing fcp URL, and you don't want to open the explorer bar, you can put a link to your FirstClass Desktop (or any other FirstClass object) on your web browser's Links bar. Use FirstClass Plugin to go to the object (make sure the object's URL is displayed in your browser's "Address" field), then drag the URL icon to the Links bar.

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Quitting FirstClass Plugin

Because you are running your web browser, you don't have to quit FirstClass Plugin the way you do the standalone client. However, if your computer might be used by others before you quit the browser, it's important to log out (Collaborate > Disconnect) when you are finished with FirstClass Plugin. If you don't, someone else could navigate to your FirstClass content.

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Running external applications
Specifying audio devices
Substituting fonts

If you are using FirstClass on Linux, you can use a text editor to update files in the firstclass directory to:

- tell FirstClass how to handle files created in other applications
- tell FirstClass what fonts to use when you view objects formatted with fonts that you do not have.

Running external applications

FirstClass knows how to handle several non-FirstClass file types, such as certain picture formats. If you have a file type that FirstClass cannot handle, and the application for that file type is installed on your computer, you can tell FirstClass which application to use with that file type.

The fcapps file tells FirstClass how to handle files created in other applications. This file ships with a default set of commands that handle some common file types. You will have to update this file in the following circumstances:

- your Linux version stores an application in a different location than that specified in fcapps
- you want to use a different application than one specified in fcapps
- you add an application.

KDE
If you are using KDE, it will ask you what application you want to open a file in, when the file type is unknown to FirstClass. The only time you need to edit fcapps is to specify a preferred application for a file type.

The syntax for each command is

`.ext,.ext...=[path/]application flags %f`

where

.ext is the extension of the file type you want FirstClass to handle (you can list variants of the extension, separated by commas)

path/ is the full path to the directory containing the application that handles this file type (you do not need to specify this if the application is in your predefined Linux path)

application is the application's name

flags are any flags you want used with this command

%f will be replaced with the name of a specific file of this type.

Examples

```
.PDF,.pdf=/usr/local/Acrobat3/bin/acroread %f
```

```
.WAV,.wav,.snd,.au,.audio=kmedia %f
```

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Specifying audio devices

You can specify which audio mixer and device you want FirstClass to use. By default, FirstClass uses /dev/mixer and /dev/device.

Specifying audio mixers/devices is useful in the following circumstances:

- sound is not working in FirstClass and you need to select a different audio mixer/device to resolve the problem
- you have multiple audio mixers/devices, and you want to direct sound to particular ones.

The syntax for specifying the audio mixer and device is

```
export FCMIXERDEV=/dev/mixer
export FCAUDIODEV=/dev/device
/opt/firstclass/fcc &
```

Example

```
export FCMIXERDEV=/dev/mixer1
export FCAUDIODEV=/dev/dsp1
/opt/firstclass/fcc &
```

FCMIXERDEV and FCAUDIODEV are environment variables. You set them from the command line or startup script before you start FirstClass.

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Substituting fonts

You can tell FirstClass what font to use when you are viewing objects that were formatted with a font that you do not have. You do this by mapping the object's original font to one of your own fonts.

Assuming you know the general characteristics of the original font, you normally try to map to a font that is similar in appearance. For example, if the original font is a standard sans serif body font, you would map to a standard sans serif body font that you have.

The fcfonts file contains a few default font mappings. You can change these mappings and add your own.

The syntax for the font mapping command is

```
"original font" = "your font"
```

Examples

```
"Verdana" = "Avantgarde"

"Courier New" = "Courier [Adobe]"
```

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